SCT Banner
Technical Training
Financial Aid Technical Training Workbook

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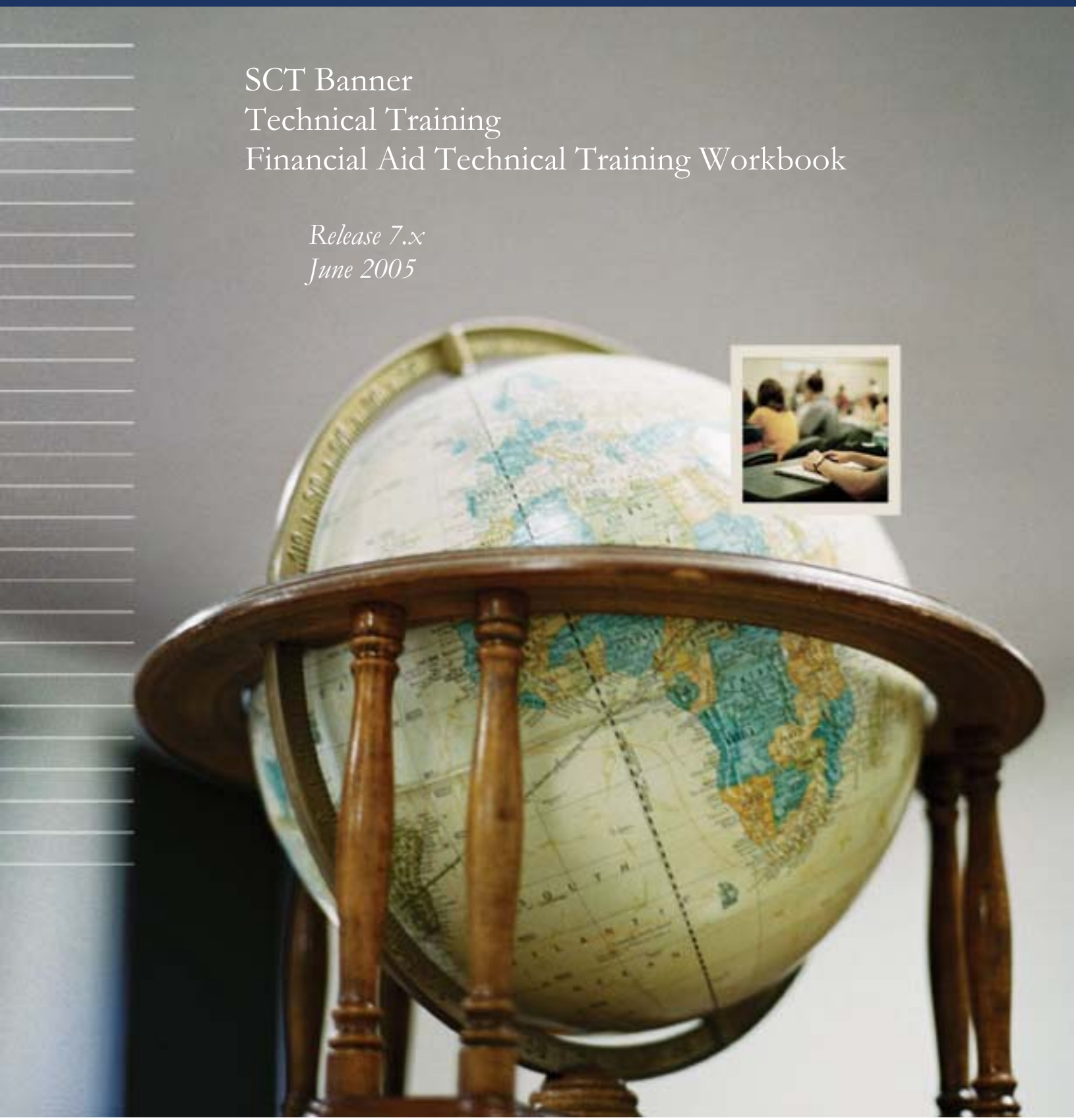

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Section A: Introduction

Overview

Workbook goal

At the end of this workbook, participants will be able to

- identify SCT Banner Financial Aid forms and tables
- query the SCT Banner Financial Aid Technical tables
- follow key Financial Aid Technical processes
- identify and read reports, processes, procedures and scripts in SCT Banner
- identify the SCT Banner Financial Aid naming conventions, form types, directories and their contents, database structure, processes and procedures
- follow the basics of how Job Submission, Population Selection, and Letter Generation work.

Intended audience

The target audience for this training course is the Technical staff, "power users" and Financial Aid managers who may use or teach others about SCT Banner Financial Aid Technical tables and processes.

Prerequisites

To complete this workbook, you should have

- completed the SCT Education Practices computer-based training (CBT) tutorial "Banner 6.x Fundamentals: Forms and Navigation," or have equivalent experience navigating in the Banner system
- basic knowledge of Oracle.

In this section

These topics are covered in this section.

Topic	Page
Introduction	A-2

Introduction

Topics

The attendees will receive a lecture and demonstration that describes the SCT Banner Financial Aid Technical module.

Topics include SCT services, SCT Banner naming conventions, data directories and their contents, database structures, Job Submission, Population Selection, Letter Generation, conversions and resources for data and help.

Section B: Financial Aid Technical Training Overview

Overview

In this section These topics are covered in this section.

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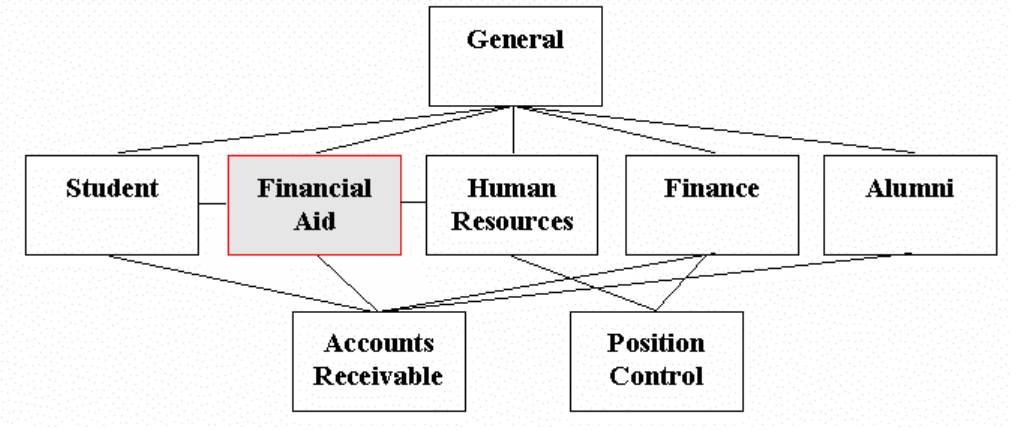
SCT Education Centers

Benefits

- Provide a centralized location for training in SCT Banner and Oracle
- Provide an environment where SCT clients can focus on learning
- Provide an opportunity to interact with colleagues from other institutions

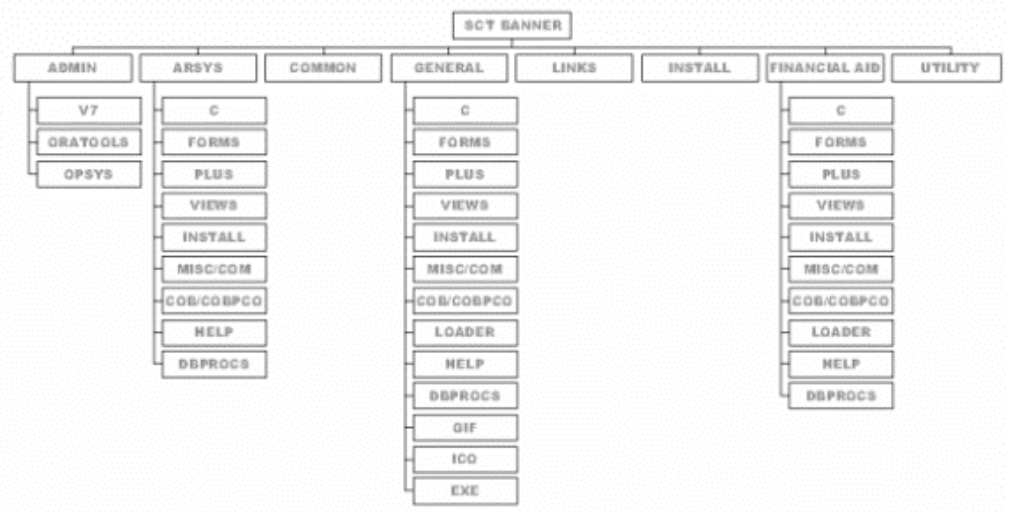
SCT Banner Products

Diagram



Financial Aid Directories

Diagram



Naming Conventions

Naming conventions

All SCT Banner objects adhere to naming conventions. The names of all SCT Banner forms (except menu forms), reports, processes and tables are seven characters long, with each character representing a position location.

Objects include forms, tables, processes, etc.

Example:

RBRBCMP (Budget Component Rule Form)

- **R -> Financial Aid**
- **B -> Budgeting**
- **R -> Rule**
- **BCMP -> (acronym)**

Position 1

Identifies the primary SCT Banner product owning the form, report, process, or table. Some common examples follow:

A	Advancement	**P**	Human Resources/ Payroll/Personnel
F	Finance	**R**	Financial Aid
G	General	**S**	Student
N	Position Control	**T**	Accounts Receivable

Position 2

Identifies module that owns the form, report, process, or table. The letter assignments will vary by SCT Banner System. The following table lists the letter assignments when position 1 = *R* (Financial Aid).

B	Budgeting	**J**	Student Employment	**R**	Requirements Tracking
C	Record Creation	**L**	Logging	**S**	Student System Shared Data
E	Electronic Data Exchange (EDE)	**N**	Need Analysis	**T**	Validation Form/ Table
F	Funds Management	**O**	Common Functions		
H	History and Transcripts	**P**	Packaging and Disbursement		

Continued on the next page

Position 3

Identifies the type of form, report, process, or table.

A	Application form	**Q**	Query form
B	Base table/Batch COBOL process	**R**	Rule table, repeating table, or report/process
I	Inquiry form	**T**	General maintenance temporary table
O	Online COBOL process	**V**	Validation form/table or view
P	Process or Procedure		

Positions 4 – 7

A unique four-character acronym identifying the form, report, process, or table.

Client-developed items

W, Y, or Z can be used as the first character for client-developed (non-SCT Banner) applications built to coexist with SCT Banner applications.

For client-developed reports or modules used within a SCT Banner application, the SCT System identifier should be used as the first character (i.e., R = Financial Aid) and W, Y, or Z should be used as the second character.

For more information, refer to Chapter 1 of the General Technical Reference Manual.

Form Types

Menu	• Lists all related forms • Outlines the System
Application/ Functional	• Allows one to enter, update, and query
Validation	• Lists all possible values for a given field • Information may be entered
Rule/Control	• Defines how variables, objects, and applications can be used
Query	• Allows information to be queried and returned to another form
Inquiry	• Used only to look up information

Validation Forms

Description

Validation forms always have *TV* as their 2nd and 3rd characters.

All validation forms must have:

- A code
- A description
- An activity date

Validation tables

Table and form names are the same.

Examples:

- Budget Type Validation table (RTVBTYP)
- Budget Group Validation table (RTVBGRP)
- Holds Validation table (RTVHOLD)

Query Forms

Description

The 3rd character of a query form is always a *Q*. Query forms can **only** be reached when called by another form.

Query forms cannot be used to change information; they are used strictly for lookups.

Examples

- Fund Determination Form (RFQDETC)
- Fund Query Form (RFQFUND)
- Disbursement Validation Query Form (ROQPVAL)
- Award Disbursement Query Form (RPQAWRD)

Inquiry Forms

Description

The 3rd character of an inquiry form is always *I.*

Inquiry forms cannot be used to change information; they are used strictly for lookups. They may be accessed from any menu.

Examples

- Applicant Need Analysis Application Inquiry Form (RNIAPPL)
- Applicant Data Log Inquiry Form (ROIALOG)
- Aid Year Inquiry Form (ROIAIDY)
- Budget Inquiry Form (RBIBUDG)

Database Dictionary

Description

The database dictionary is a set of tables and views used as a read-only reference about the database.

It is one of the most important parts of an Oracle database, because it contains:
- Names of schema objects (tables, views…)
- Names of Oracle users
- Privileges and roles granted to each user

Maintenance

The database dictionary is maintained internally.
- System table space
- Select only

In SQL*Plus, describe dictionary (or *desc dict*).

Ownership

SYS owns all base dictionary tables.
- Users have access to views of the data dictionary
- No user should alter any object contained in the SYS schema

During normal operation, Oracle verifies the existence of objects and checks whether users have proper access to them.

catalog.sql

- Creates the database dictionary and public synonyms
- Grants public access to the synonyms

Retrieval

The database dictionary is divided by users. To retrieve basic information, use:
- ALL: Lists all objects that a user has been granted access to
- USER: Lists all objects that a user owns
- DBA: Lists all objects in the database
- ALL_TABLES: Descriptions of tables
- ALL_COL_COMMENTS: Comments on columns of accessible tables
- ALL_TAB_COLUMNS: Lists columns contained in all tables
- ALL_TAB_COMMENTS: Comments on tables
- ALL_USERS: Information on all users in database
- ALL_VIEWS: Lists views accessible to user

Continued on the next page

Database Dictionary, Continued

Table and module ownership

For more complete information, refer to Oracle Server Reference or select *table_name* from *dict* in SQL*Plus.

Product	Table owner in Oracle	Module owner in SCT Banner
Accounts Receivable	TAISMGR	TAISUSR
Alumni	ALUMNI	ADISUSR
General	GENERAL	GENERAL
Finance	FIMSMGR	FIMSUSR
Payroll	PAYROLL	HRISUSR
Position Control	COSNCTL	HRISUSR
Financial Aid (Resources)	FAISMGR	FAISUSR
Student	SATURN	SAISUSR

Referential Integrity

Definition	Referential integrity is a condition by which a dependent table's foreign key must have either a null entry or a matching entry in a related table. Oracle enforces relationships between tables through the use of primary and foreign key constraints. SCT Banner uses naming conventions for these objects. Note: Keys are implemented as constraints.
Primary key	A candidate key, selected as a unique entity identifier, which enforces unique, non-null keys. PK_ppppppp is the SCT Banner convention for primary keys, where • **PK** stands for Primary key • **ppppppp** is the Primary key table name
Primary key example	Example: PK_STVTERM • Alter Term Code Validation table (STVTERM) • Add constraint PK_STVTERM • Primary key (column_name)
Foreign key	An attribute in one table whose values must match the primary key in another table or whose values must be null. A table can have any number of foreign keys. Usage: • Referencing validation tables • Application hierarchy

Continued on the next page

Referential Integrity, Continued

Foreign key - validation	Validation tables: FK + n + "_" + fffffff + "_INV_" + ppppppp + "_code" is the SCT Banner convention for Foreign keys, where: • **FK** stands for Foreign key • **n** is a one-up number which distinguishes potential duplicate Foreign key names in a given table • **fffffff** is the Foreign key table name • **ppppppp** is the Primary key table name Example: FK3_RPRATRM_INV_STVTERM_CODE • Alter Applicant Award by Term table (RPRATRM) • Add constraint FK3_RPRATRM_INV_STVTERM_CODE • Foreign key (sfrstcr_code,) • References STVTERM (STVTERM_CODE)
Foreign key - hierarchy	Application hierarchy: • "FK"+1up#+"_"+foreign_table+"_INV_"+ Primary_table_"KEY" • FK3_ROBUSDF_INV_RORSTAT_KEY
STVTERM	Before a record may be added to RPRATRM, it must exist in RORSTAT.

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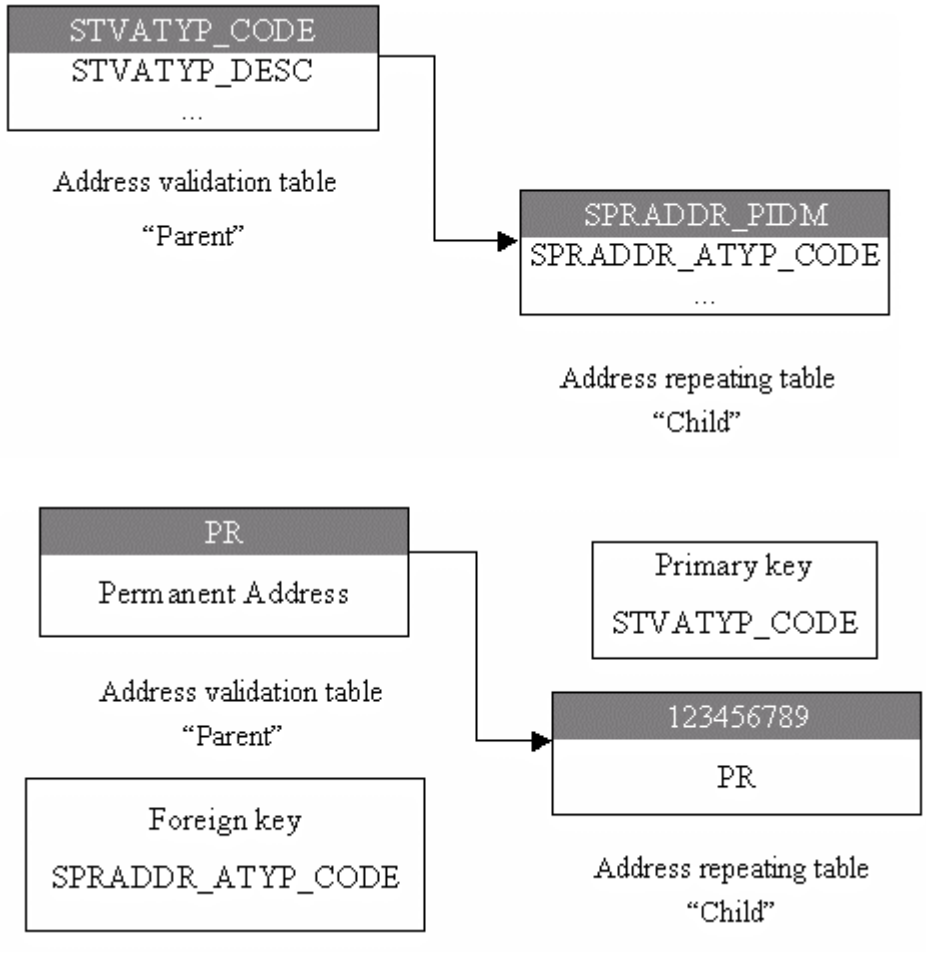
Referential Integrity, Continued

Parent and child rows

The Child row has the foreign key constraint and the Parent row has the primary key constraint.

The Parent row cannot be deleted when a Child row exists.



Data Standardization

Components

- IDs
- Names
- Addresses
- Dates

Identification Numbers

Persons	Enter an identification number of your choice, or use the identification number that the System generates on any identification form (xPAIDEN).
Non-persons	Use the System-generated identification number.

Names

Basic format	Prefix First Name Last Name Suffix Mr. William Smith-Jones III
Case	Use conventional upper- and lower-case letters.
Last name considerations	Do not enter spaces within prefixed last names: • MacArthur O'Connor VanHusen • St.John deBolt DuShen Do not enter spaces within hyphenated last names: • Smith-Jones Cochram-Ashley
First initials/ middle name	For names using a first initial and middle name, enter a period and one space between the initial and the name. (Example: R. Maureen Smith)
Prefixes/Suffixes	Use periods after prefixes and suffixes where applicable: Miss Mrs. Mr. Jr.

Addresses

Pound sign (#)	Do not use a pound sign (#) when completing an **Address** field if your organization uses SCT Banner Letter Generation. (SCT Banner Letter Generation recognizes a pound sign as a formatting command.)
Code definitions	County codes are defined on the County Code Validation Form (STVCNTY). State and province codes are defined on the State/Province Code Validation Form (STVSTAT). (State and Province names are entered into the **State/Prov** fields.)

Dates

Date format selection	You may select the date format via the **Date Format** radio button on the Installation Control Form (GUAINST).
Date formats (MDY, DMY, YMD)	• MDY November 6, 2005 is entered as 11/06/05 • DMY November 6, 2005 is entered as 06/11/05 • YMD November 6, 2005 is entered as 05/11/06
Notes	• If you enter only part of the date, the rest of the current date defaults • If you are including a date in query criteria, always include the century • You can enter a dash (-) instead of a slash (/) • For Job Submission dates, use *DD-MON-YYYY* format on the Process Submission Controls Form (GJAPCTL)

PIDMs

What is a PIDM?

A "Primary Identification Master," or PIDM, uniquely identifies the records of one person or non-person entity in SCT Banner.

It is an internal key field used to identify and store records, and is assigned automatically when new records are created.

A PIDM is generated from an Oracle Sequence called PIDM_SEQUENCE through a function named F_GEN_PIDM.

SOBSEQN

Purpose

This common overall base table is used to store one-up numbers for various entities. It should have maintenance access set at the highest security level.

Contents of SOBSEQN

```
select * from sobseqn;

SOBSEQN_FUNCTION               S SOBSEQN_MAXSEQNO SOBSEQN_A
------------------------------ - ---------------- ---------
RECEIPT                                       203 22-FEB-05
ID                             @               18 19-SEP-96
PIDM                                          571 07-JAN-05
ALUMNIGIFT                                    108 21-FEB-05
ALUMNIPLEDGE                                   44 15-FEB-05
EDIREQUESTID                                    1 25-APR-95
EDI_DCMT_SEQNO                                  1 08-DEC-95
ALUMNIDUES                                      3 15-FEB-05
ALUMNIRECEIPT                                   1 31-JAN-96
EVENT                          A                4 15-FEB-05
HRREQ                          R                1 23-NOV-04
PROSPECT_ID                    P                0 04-JUN-03
HRENCD96                                    10004 18-NOV-04
HRENCD05                                    10003 17-FEB-05
```

PIDMs and SOBSEQN

Using SOBSEQN

How to get the next available PIDM:

- Select pidm_sequence.currval from DUAL;
- Select pidm_sequence.nextval from DUAL;

Self Check

Directions	Use the information you have learned in this workbook to complete this self check activity.
Exercise 1: Data Dictionary	Write a simple script to use as a tool to list information about SCT Banner Financial Aid tables, to include table_name, table_comment. The script should include ability to ask user for name of table and should accept partial input. Save your script to a temporary directory on your computer for future use.
Exercise 2: Referential Integrity	Write a simple script to use as a tool to examine constraints placed on tables by SCT Banner designers. Save your work.

Continued on the next page

Self Check, Continued

Exercise 3: Referential Integrity Challenge

Write a script that will show constraint name, column name, position, type of constraint, constraint status and table name.

Exercise 4: General Person

Write a simple query to get ID, first name, middle name, last name, and the Change indicator for persons who have had changes made to their ID on the Identification Form (SPAIDEN) records.

Continued on the next page

Self Check, Continued

Exercise 5

Write a simple query to get PIDM, ID, first name, middle initial, last name, and Social Security number for persons who have had changes made to their name records.

Self Check – Answer Key

Exercise 1: Data Dictionary

Write a simple script to use as a tool to list information about SCT Banner Financial Aid tables, to include table_name, table_comment. The script should include ability to ask user for name of table and should accept partial input.

Save your script to a temporary directory on your computer for future use.

```
column comments format a30 word wrap
select table_name, comments
  from all_tab_comments
 where table_name like upper('&Table_Name')
   and table_name not like '%$%'
 order by table_name
```

Exercise 2: Referential Integrity

Write a simple script to use as a tool to examine constraints placed on tables by SCT Banner designers.

Save your work.

```
column constraint_name format a30 word_wrap
column column_name format a25
   set linesize 130
select constraint_name, column_name,
       position, table_name
  from all_cons_columns
 where column_name like upper('&TableName%')
 order by table_name, position
```

Continued on the next page

Self Check – Answer Key, Continued

Exercise 3: Referential Integrity Challenge

Write a script that will show constraint name, column name, position, type of constraint, constraint status and table name.

```
column constraint_name format a30 word_wrap
column column_name format a25
column ctype format a22 head 'Constraint Type'
   set linesize 130
select all_cons_columns.constraint_name,
       all_cons_columns.column_name,
       all_cons_columns.position,

decode (all_constraints.constraint_type,'R','Referencial
       Integrity', 'C','Not Null/Check','P','Primary
       Key','U','Unique','V','With Check Option','O',
       'With Read Only') ctype, all_constraints.status,
       all_cons_columns.table_name
  from all_cons_columns, all_constraints
 where all_cons_columns.column_name
       like upper('&TableName%')
   and all_cons_columns.constraint_name =
       all_constraints.constraint_name
   and all_cons_columns.table_name =
       all_constraints.table_name
 order by table_name, all_constraints.constraint_name,
       position
```

Exercise 4: General Person

Write a simple query to get ID, first name, middle name, last name, and the Change indicator for persons who have had changes made to their ID on the Identification Form (SPAIDEN) records.

```
SELECT    spriden_id,
          spriden_first_name,
          spriden_mi,
          spriden_last_name,
          spriden_change_ind
  FROM    spriden
 WHERE    spriden_change_ind = 'I'
   AND    spriden_entity_ind = 'P'
```

Continued on the next page

Self Check – Answer Key, Continued

Exercise 5

Write a simple query to get PIDM, ID, first name, middle initial, last name, and Social Security number for persons who have had changes made to their name records.

```
select spriden_pidm,
       spriden_id,
       spriden_first_name,
       spriden_mi,
       spriden_last_name,
       spbpers_ssn,
       spriden_change_ind
  from spriden, spbpers
 where spriden_change_ind = 'N'
   and spriden_entity_ind = 'P'
   and spriden_pidm = spbpers_pidm
```

Section C: Database Tool Set for SQL

Overview

In this section These topics are covered in this section.

Topic	Page
SQL*Plus Scripts	C-2

SQL*Plus Scripts

Scripts

The following scripts are used to examine the database structure using SQL*Plus.

check_col_comments.sql

```
column comments format a30 word_wrap
select column_name,comments
  from all_col_comments
 where table_name like upper('&Table_Name%')
 order by column_name
/
```

check_tab_comments.sql

```
column comments format a30 word_wrap
select table_name,comments
  from all_tab_comments
 where table_name like upper('&Table_Name%')
   and table_name not like '%$%'
 order by table_name
/
```

check_cons.sql

```
column constraint_name format a30 word_wrap
column column_name format a25
column ctype format a22 head 'Constraint Type'
   set linesize 130
select constraint_name,column_name,
       position,table_name
  from all_cons_columns
 where column_name like upper('&TableName%')
                 order by table_name, position
/
```

Continued on the next page

SQL*Plus Scripts, Continued

check_cons_all.sql

```
column constraint_name format a30 word_wrap
column column_name format a25
column ctype format a22 head 'Constraint Type'
   set linesize 130
select all_cons_columns.constraint_name,
        all_cons_columns.column_name,
        all_cons_columns.position,
             decode
(all_constraints.constraint_type,'R',
       'Referencial Integrity', 'C','Not
        Null/Check','P','Primary Key',
       'U','Unique','V','With Check Option',
       'O','With Read Only') ctype,
       all_constraints.status,
       all_cons_columns.table_name
  from all_cons_columns, all_constraints
 where all_cons_columns.column_name
       like upper('&TableName%')
   and all_cons_columns.constraint_name =
       all_constraints.constraint_name
   and all_cons_columns.table_name =
       all_constraints.table_name
 order by table_name, all_constraints.constraint_name,
       position
/
```

self-generating.sql

```
set head off
set echo off
/*
  At prompt enter name or partial name of a table.
  then enter part of a column name ie. code.
*/
spool on
select 'select distinct '||column_name||' from '
        ||table_name||';'
  from dba_tab_columns
 where table_name like upper('&tables%')
   and column_name like upper('%&column%')
/
spool off
pause Press any key to continue
edit on.lst
pause Don't forget to set head on and set echo on before
running any of these scripts.  Press any key to
continue.
```

Section D: Review of Financial Aid Process

Overview

In this section These topics are covered in this section.

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Overview, Continued

In this section (cont.)

These topics are covered in this section.

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Financial Aid Process

Student applies for aid	The student will fill out and submit:
	• Free Application for Federal Student Aid (FAFSA).
	  • Student competes for Financial Aid on an ANNUAL Basis
	  • Output from FAFSA is the Student Aid Report (SAR)
	  • Student receives SAR in the mail
	  • Institution receives SAR electronically (ISAR)
	  • Expected Family Contribution (EFC)
	• Institutional application
	• Application for admission to the institution

Financial Aid reviews paperwork	• File Processing • Verification • Request additional documentation • Tracking Letter • Documents required for packaging or disbursement • Paperwork completed – 'File Complete' • SAP review
Packaging – awarding of aid	• Federal Pell Grant determined by EFC and budget • Campus-based aid (SEOG, Perkins Loan, and Federal Work Study) based on institutional packaging guidelines • Scholarships – merit and need • Loans – subsidized, unsubsidized and Plus

Types of Financial Aid

Aid types

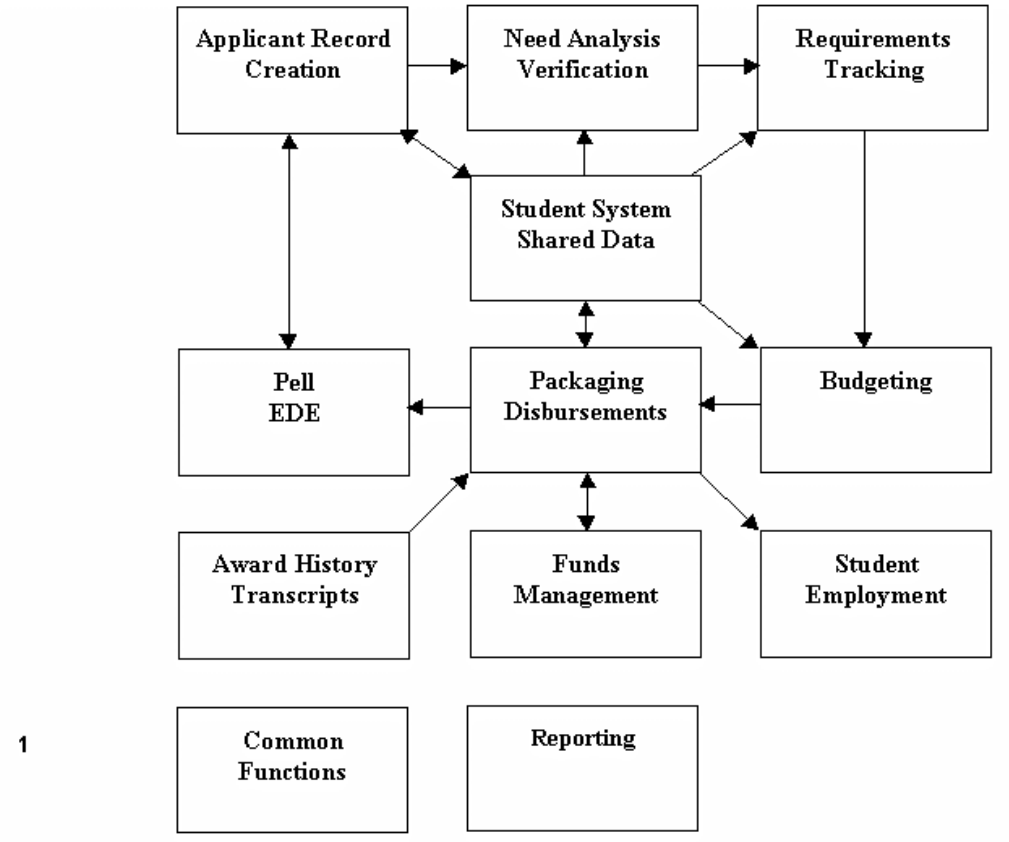
- Scholarships
- Work-Study
- Loans (Subsidized, Unsubsidized, Parent, Perkins)
- Grants
  - Federal Pell Grant
  - Federal Supplemental Opportunity Grant (SEOG)
  - State Grants
  - Institutional Grants

Acceptance and Application of Aid

Award letter	An award letter is mailed to a student, who has the option to accept or decline the awarded aid. When the student's acceptance of the aid is entered into the system, the aid is then ready for memo, authorization or payment.
Fee assessment and billing	Students register for and are subsequently billed for courses. Aid is then applied to student accounts.
Reporting	• Federal Pell Grant Report • FISAP (Fiscal Operations Report) • State Grant Reporting

Financial Aid System Process Flow

Diagram



[1] Financial Aid TRM Supplement, pages 1-2 and 1-3 (12 of 156).

Applicant Record Creation

Applicant record creation

Financial Aid applicant records can be created through several processes, including MDE tape loads, Pell Electronic Data Exchange, and manual creation using Record Creation/Need Analysis forms such as RRAAREQ, RNANAxx .

Applicant record creation forms

Seven-character name	Proper name of form, process, report, or table
ROASTAT	Applicant Status Form
ROARMAN	Financial Aid Record Maintenance
RNANAxx	Need Analysis Form
RNAPRxx	Need Analysis Processing Form
RNAVRxx	Need Analysis Document Verification Form
RNARSLT	Need Analysis Result Form
RRAAREQ	Applicant Requirements Form
RBAABUD	Applicant Budget Form
RPAAWRD	Award Form
RSIHIST	Summary Academic History Inquiry Form
RSIENRL	Financial Aid Enrollment Inquiry Form
RSISTDN	Basic Student Information Inquiry Form
RSIAPPL	Admissions Application Inquiry Form
RSIAREV	Account Detail Review Inquiry Form
RSIDEGR	Degrees and Other Formal Awards Inquiry Form
RSIHOUS	Housing Information Inquiry Form
RSIPCOL	Prior College Inquiry Form
RSIHSCH	High School Inquiry Form
RSITEST	Test Score Inquiry Form
RSIVETN	Veteran Certification Inquiry Form
RSIINTL	International Student Inquiry Form
RSICONT	Third Party Contract Inquiry Form
RSIEXPT	Billing Exemption Inquiry Form

Applicant Record Creation Data Load Procedures

Procedures

- Load electronic media from external sources
- Stored in temporary ORACLE tables
  - By processes RCBCTxx (CSS) or RCBTPxx (EDE)
  - Used by the RCPMTCH process
- RCRTPxx process completes load

For more information on these procedures, refer to Chapter 2 of the SCT Banner Financial Aid User Manual.

Prepare for the Data Load Process

RTVINFC	Set up the Application Tape ID Validation Table • The values are delivered already populated. • To set up this form, find the source code(s) used at your institution. Define the rest of the columns for that source. This includes setting a requirements code (tracking requirement) that can be updated when the data is loaded, which is a supplemental requirement that can be used for CSS. The related tracking requirement status is also defined. • The **Contact Type** and **Recruiting Source** fields must be populated for the Data Load process to run to completion. Even though you may not be creating recruitment records, this data is required for Part 3 of the Data Load process (RCRTPxx) to complete successfully.
RCRTPTR	Build the Interface Data Translation Rules Form (RCRTPTR) • Determine the conversion values on the Interface Data Translation Rules Form (RCRTPTR). The converted data is data that is contained on the incoming data file. The fields that you must define are **Major Code, Marital Status** and **SBGI Code**. These fields may contain data that the institution uses and this is the opportunity to make the incoming data match the institutionally defined validation tables for these fields.
Common Matching	Enter values and rules on the Common Matching Forms.
ROAINST	Build the Institutional Financial Aid Options Form (ROAINST) • The following fields must all be defined prior to running the data load for the year: **Current Term Code**, **Start Year**, **End Year**, **EFC Proration**, **Default Aid Period**, **Primary MDE**, **SBGI Conversion**, **Initial SAP Code**, **Update Trans#/EFC**, **Applicant Received Date Indicator**, and the **MDE** codes, if applicable.
RCRDTSR	Establish the matching siource and parameter set for the aid year and data source used for the processing of indivicual records from the Financial Aid Suspended Record Maintenance Form (RCRSUSP).

Continued on the next page

Prepare for the Data Load Process, Continued

Destination directory	Regardless of what source your data is being received from and in which format, the data must be loaded to the $DATA_HOME/finaid directory for UNIX or DATA$HOME for VMS. (Ensure that you have write privileges to the appropriate directory).
Filenames	The disk file name (data load file) must be renamed to match what the processes are expecting. Rename the file to: • xxyyesar.tap (EDE ISIR diskette or download) • xxyyesat.tap (EDE ISIR tape) • xxyycssd.tap (CSS diskette or download) • xxyycsst.tap (CSS tape) This step must be completed every time there is a new input file to be loaded to the system.

Run the Data Load Process

Data Load steps

- Run RCBTPxx (Part 1 of Data Load for federal data) or
- Run RCBCTxx (Part 1 of Data Load for CSS PROFILE data only)
- Run RCPMTCH (Part 2 of Data Load)
- Run RCRTPxx (Part 3 of Data Load)
  - It is important to run the RCPMTCH and RCRTPxx steps as close together as possible. This decreases the chances of someone adding new students online, which would make the New status (as determined by RCPMTCH) incorrect.
- Run the RCPDTMP Process

Need Analysis/Verification Forms and Tables

Forms

The Need Analysis process performs calculations that determine the contribution an applicant can make toward his/her expenses. The Verification process validates certain information provided on an aid application against the same data from other documents.

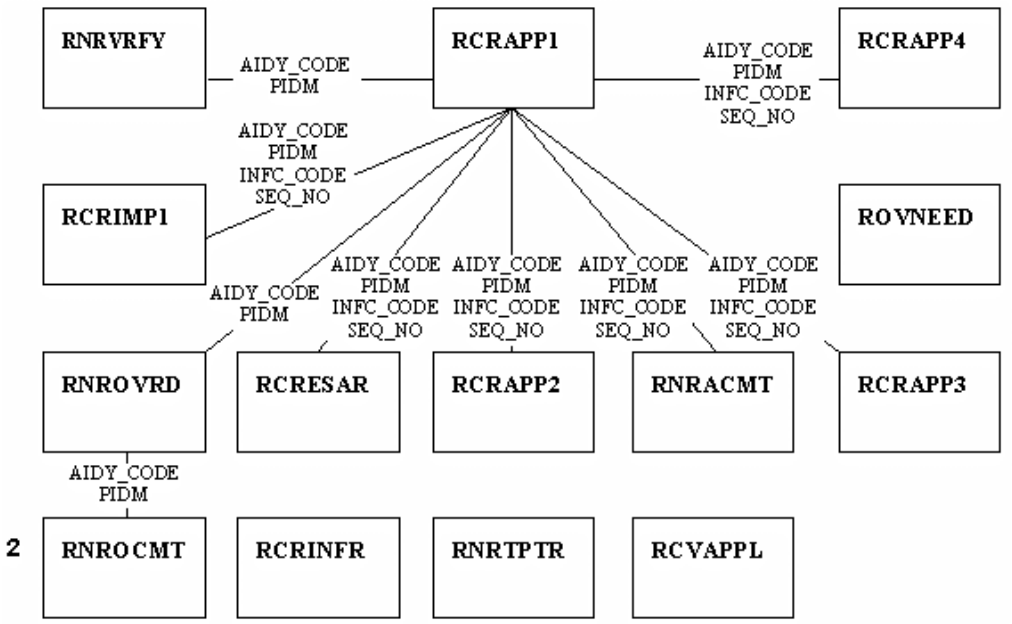
Seven-character name	Proper name of form, process, report, or table
RNANAxx	[Year-specific] Need Analysis Form
RNAPRxx	[Year-specific] Need Analysis Processing Form
RNASUxx	[Year-specific] Need Analysis Supplemental Form
RNARSLT	Need Analysis Result Form
RNAOVxx	[Year-specific] Applicant Override Form
RNIAPPL	Applicant Need Analysis Application Inquiry Form
RNINSLD	Applicant Student Loan Data Inquiry Form
RNINAIQ	Calculated Need Analysis Detail Inquiry Form
RNIMSxx	[Year-specific] Miscellaneous Results Inquiry Form
RNRGLxx	INAS Global Policy Options Rules Form
ROASTAT	Applicant Status Form
ROAPELL	Applicant Pell Grant Form
RNAVRxx	[Year-specific] Need Analysis Document Verification Form
RNAPURG	Application Purge Form
RNASLxx	[Year-specific] Student Loan Data System Form

Tables

Seven-character name	Proper name of form, process, report, or table
RNRACMT	Financial Aid Application Comments
RNRGLBL	INAS Global Policy Options Table
RNROCMT	Financial Aid Application Override Comments
ROROVRD	Applicant Need Analysis Override Table
RNRVRFY	Needs Analysis Verification Table

Need Analysis/Verification Table Relationships

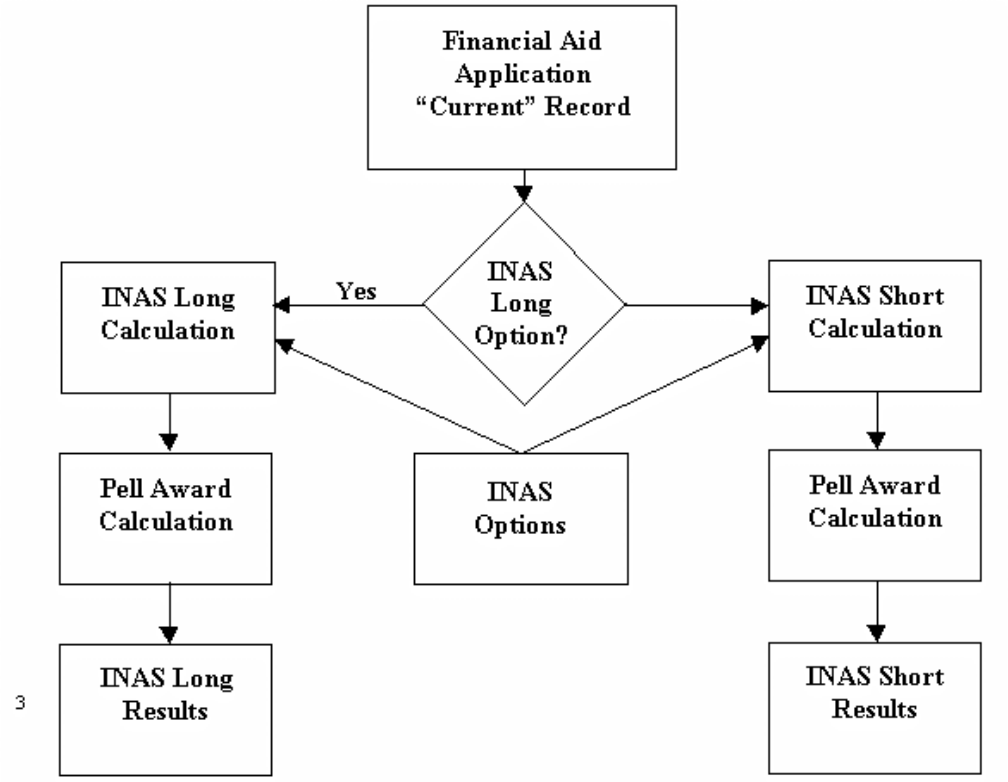
Diagram



[2] Banner2000 Financial Aid Supplement, page 2-6 (60 of 156), September 1999.

Need Analysis Online Recalculation Process Flow

Diagram



[3] Financial Aid TRM Supplement, pages 1-14 (24 of 156).

Requirement Tracking Forms and Tables

Forms

The Requirements Tracking module monitors the request for and receipt of certain documents Financial Aid applicants are often required to provide, so that their applications can be fully processed.

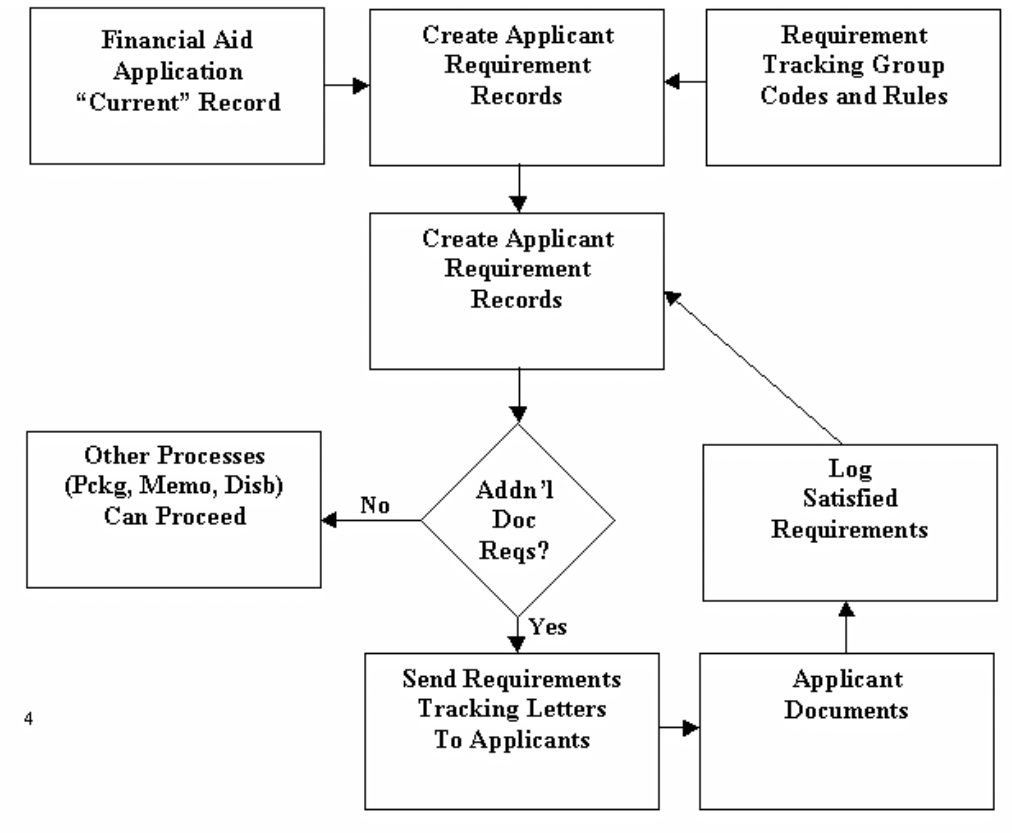
Seven-character name	Proper name of form, process, report, or table
RRAAREQ	Applicant Requirements Form
ROARMAN	Financial Aid Record Maintenance Form
RRAMASS	Applicant Requirements Mass Entry Form
RHACOMM	Applicant Comments Form
ROAIMMP	Applicant Immediate Process Form

Tables

Seven-character name	Proper name of form, process, report, or table
RRRGREQ	Tracking Group/ Requirements Rules
RRRAREQ	Applicant Requirements
RRRTMSG	Tracking Requirement Message Rules
RRVAREQ	Requirements View
RRVREQ1	Object: Access F/A Requirements View

Requirement Tracking Process Flow

Diagram



[4] Financial Aid User Manual/Requirements Tracking, page 7-4 (4 of 8)

Requirements Tracking Processes and Procedures

RTVTREQ	Requirements Tracking Validation Form (RTVTREQ) • Define tracking requirement codes. Examples might include institutional applications, FAT, tax returns, verification statements, SARs, loan applications, etc.
RTVTRST	Requirements Tracking Status Validation Form (RTVTRST) • Define tracking requirement status codes. Examples might include received, waived, established, satisfied, cancelled, or received incomplete.
RTVTGRP	Requirements Tracking Group Validation Form (RTVTGRP) • Define tracking groups. Examples might include variations of Graduate vs. Undergraduate documents, Selected for Verification documents, Independent vs. Dependent verification groups, etc.
RRRGREQ	Requirements Tracking Group/Requirements Rules Form (RRRGREQ) • Develop tracking group requirements for each group. Indicate which documents are required for each specific tracking group. • You have the opportunity here to change your defaults for a specific code from the defaults you indicated on RTVTREQ for the code. • These defaults will only be used if the system brings in the requirements for the specific student. If the requirement is entered manually and the manually entered code is not defined in the student's particular tracking group, the default from the RTVTREQ table will appear.
RORRULE	Financial Aid Selection Rules Form (RORRULE) • Develop tracking group rules associated with each group. Assign criteria for placing applicants into tracking groups. Use the standard SCT Banner data element dictionary table. Selection criteria may come from the SCT Banner Student System, Financial Aid System, or any other SCT Banner system which has been installed.
RRRTMSG	Requirements Tracking Code/Message Rules Form (RRRTMSG) • Develop specific messages for each tracking code, if desired.
ROBBGRP	Batch Automatic Grouping process (ROBBGRP) • Perform Budget, Tracking and/or Packaging group assignment in batch mode for all applicants or a selected population of applicants.
ROOAUTO	Automatic Grouping process (ROOAUTO) • Perform Online Budget, Tracking and Packaging group assignment for a specified applicant. This process may be accessed via the Applicant Immediate Process Form (ROAIMMP).

RORRULE and ROOGSQL

ROOGSQL	The Online Group Assignment Selection Criteria Generation process (ROOGSQL) creates a SQL statement from the budgeting, tracking and packaging group selection rules created by the Financial Aid Selection Rules Form (RORRULE).

Student System Shared Data Forms

Shared data forms

The SCT Banner Financial Aid System is designed to share information with the institution's Student Information System (the SCT Banner Student System or another Student system).

Data is shared with the SCT Banner Student System through a series of views that contain information that the Financial Aid system may require for certain processes. This information is available through a series of inquiry-only forms listed on the Student System Shared Data menu. Student System data is shared through these views, rather than via direct access of the SCT Banner Student System tables.

Thus, in the event that SCT Banner Financial Aid is installed as a stand-alone product in an environment in which SCT Banner Student is not installed, these views can be created as tables by the institution and periodically populated with data from its Student System.

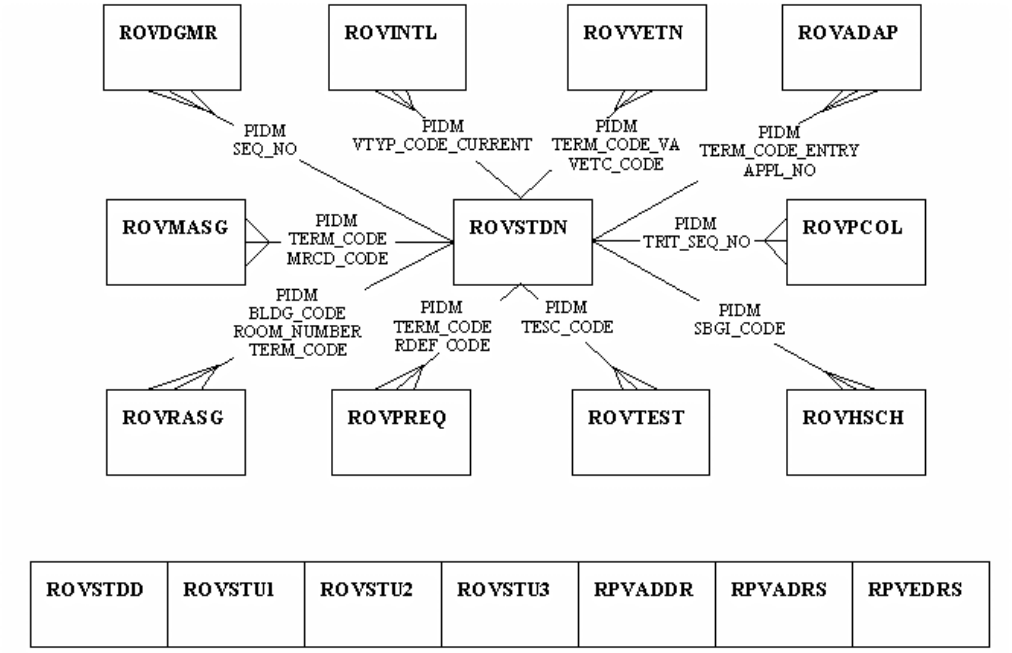
Seven-character name	Proper name of form, process, report, or table
RSIHIST	Summary Academic History Inquiry Form
RSIENRL	Financial Aid Enrollment Inquiry Form
RSISTDN	Basic Student Information Inquiry Form
RSIAPPL	Admissions Application Inquiry Form
RSIAREV	Account Detail Review Inquiry Form
RSIDEGR	Degrees and Other Formal Awards Inquiry Form
RSIHOUS	Housing Information Inquiry Form
RSIPCOL	Prior College Inquiry Form
RSIHSCH	High School Inquiry Form
RSITEST	Test Score Inquiry Form
RSIVETN	Veteran Certification Inquiry Form
RSIINTL	International Student Inquiry Form
RSICONT	Third Party Contract Inquiry Form
RSIEXPT	Billing Exemption Inquiry Form

Student System Shared Data Tables and Views

Seven-character name	Proper name of form, process, report, or table
RORENRL	Enrollment Status Financial Aid Captured data
ROVSTDN	Basic Student Information
ROVADAP	Admissions selection
ROVADxx	Admission information
ROVDGMR	Degree information

Student System Shared Data Process Flow

Diagram

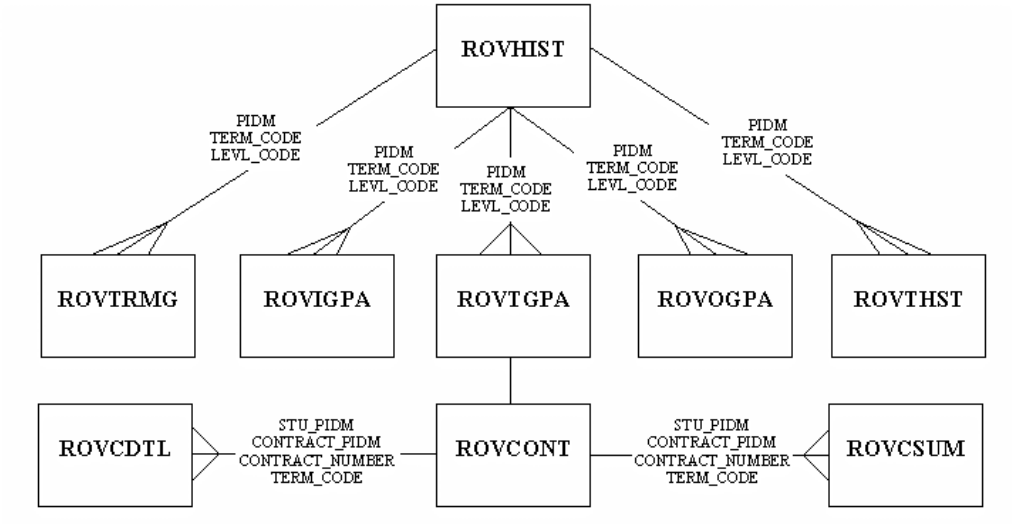


[5]

[5] Financial Aid TRM Supplement, page 2-26 (80 of 156)

Student System Process Flow

Diagram



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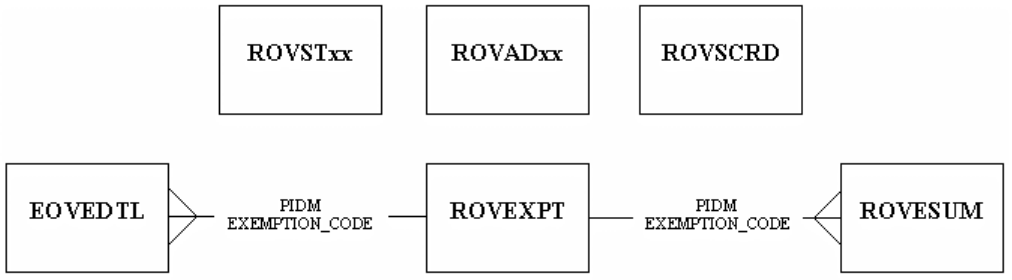

7

6 Financial Aid TRM Supplement, page 2-28 (82 of 156)

7 Financial Aid TRM Supplement, page 2-30(84 of 156)

RSRENRL	Financial Aid Enrollment Hours Process (RSRENRL) • Add credit and billing hours from student enrollment to Financial Aid • C process, used to 'capture' or 'freeze' hours

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Pell Electronic Data Exchange Forms

Pell EDE

The Pell EDE program allows institutions to share information electronically with the Pell central processor.

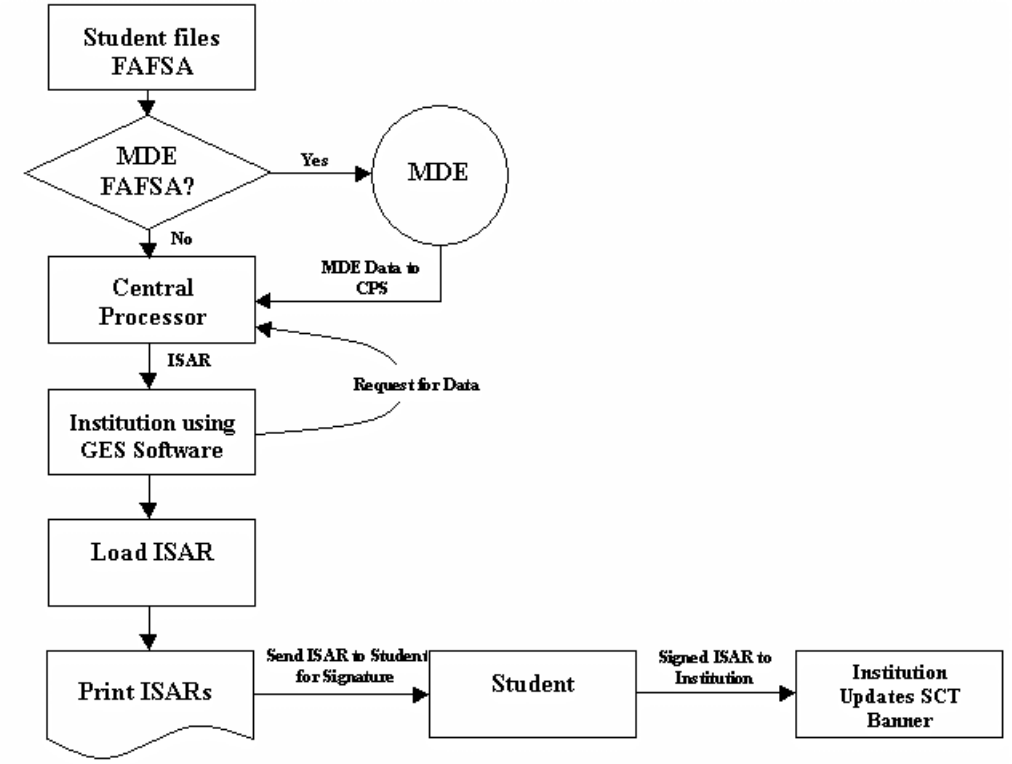
Seven-character name	Proper name of form, process, report, or table
REACORR	ISIR Correction/Request Form
RPIBATC	Batch Control Form
READRCT	EDE Directory Form
RNIMSxx	[Year-specific] Miscellaneous Results Inquiry Form
RTVRJCT	Rejection Code Validation Form
REAORxx	[Year-specific] Pell Origination/Acknowledgement Form
READIxx	[Year-specific] Pell Disbursement/Acknowledgement Form
REISSOA	Summary Statement of Account Inquiry Form
REIDSOA	Detail Statement of Account Inquiry Form
RERRDRQ	Data Request Record Form
REIRMRR	Multiple Reporting Record Inquiry Form
REIYTDS	Year to Date Pell Summary Inquiry Form

Pell Electronic Data Exchange Tables

Seven-character name	Proper name of form, process, report, or table
RCRESAR	Applicant ESAR
REBDRCT	EDE Directory
REBPAYV	Applicant Payment Voucher

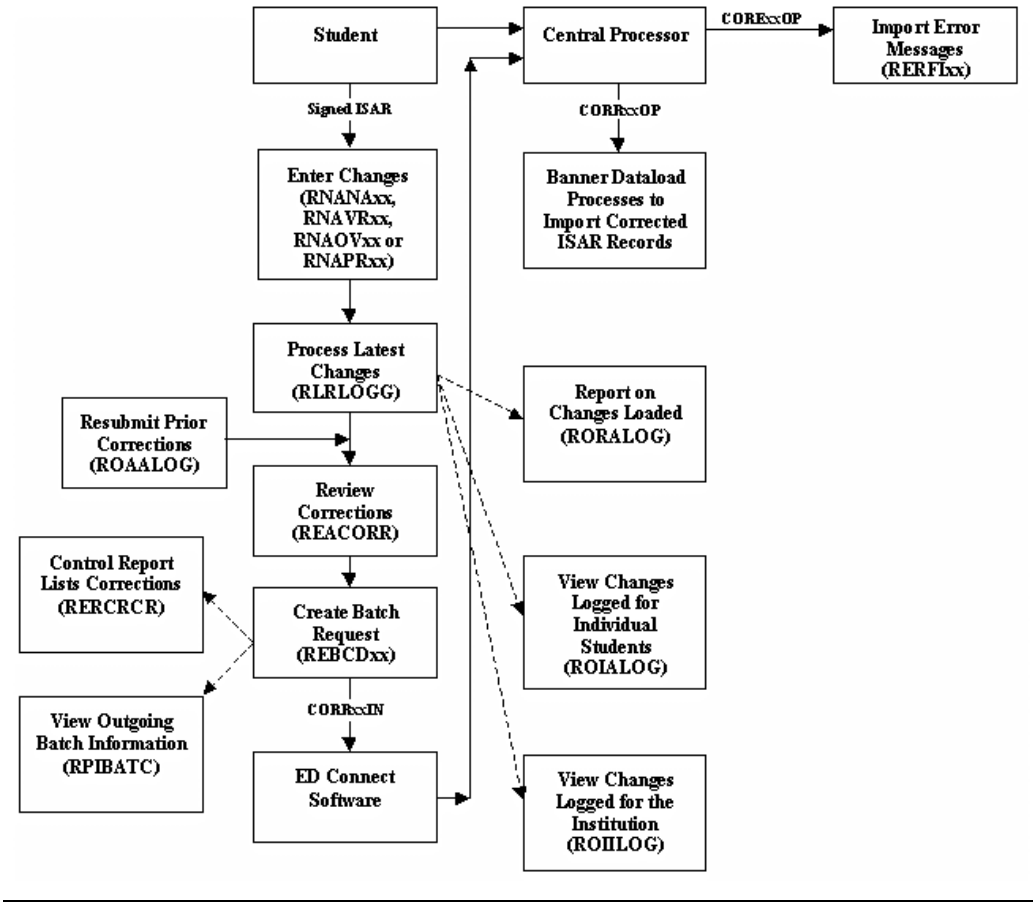
ISIR Data Receipt Process Flow

Diagram



EDE ISIR Data Correction Process Flow

Diagram



Budgeting Forms, Tables and Reports

Forms

Budgeting maintains data regarding an applicant's cost of attending an institution.

Seven-character name	Proper name of form, process, report, or table
RBAABUD	Applicant Budget Form
ROARMAN	Financial Aid Record Maintenance
RHACOMM	Applicant Comments Form
ROAIMMP	Applicant Immediate Process Form

Tables

Seven-character name	Proper name of form, process, report, or table
RBBABUD	Applicant Budget Table
RBRACMP	Applicant Budget Component Table

Processes, procedures and reports

There are no Budgeting processes or procedures.

There are, however, two reports:

- Applicant Budget Report (RBAABUD)
- Budget Component Report (RBRBCMP)

Funds Management Forms and Tables

Forms

Funds Management maintains data related to Financial Aid funding sources.

Seven-character name	Proper name of form, process, report, or table
RFRMGMT	Fund Management Form
ROAMGMT	Funds Management Form
RFIBUDG	Fund Budget Inquiry Form
RFIFFID	Federal Fund ID Inquiry Form
RPIFEDR	Federal Rules Inquiry Form
RFRDEFA	Default Award and Disbursement Schedule Rules Form
RFRASCH	Fund Award and Disbursement Schedule Rules Form
RORRULE	Financial Aid Selection Rules Form
RFRBASE	Fund Base Data Form
RTVFSRC	Fund Source Code Validation Form
RTVFTYP	Financial Aid Fund Type Validation Form

Major tables

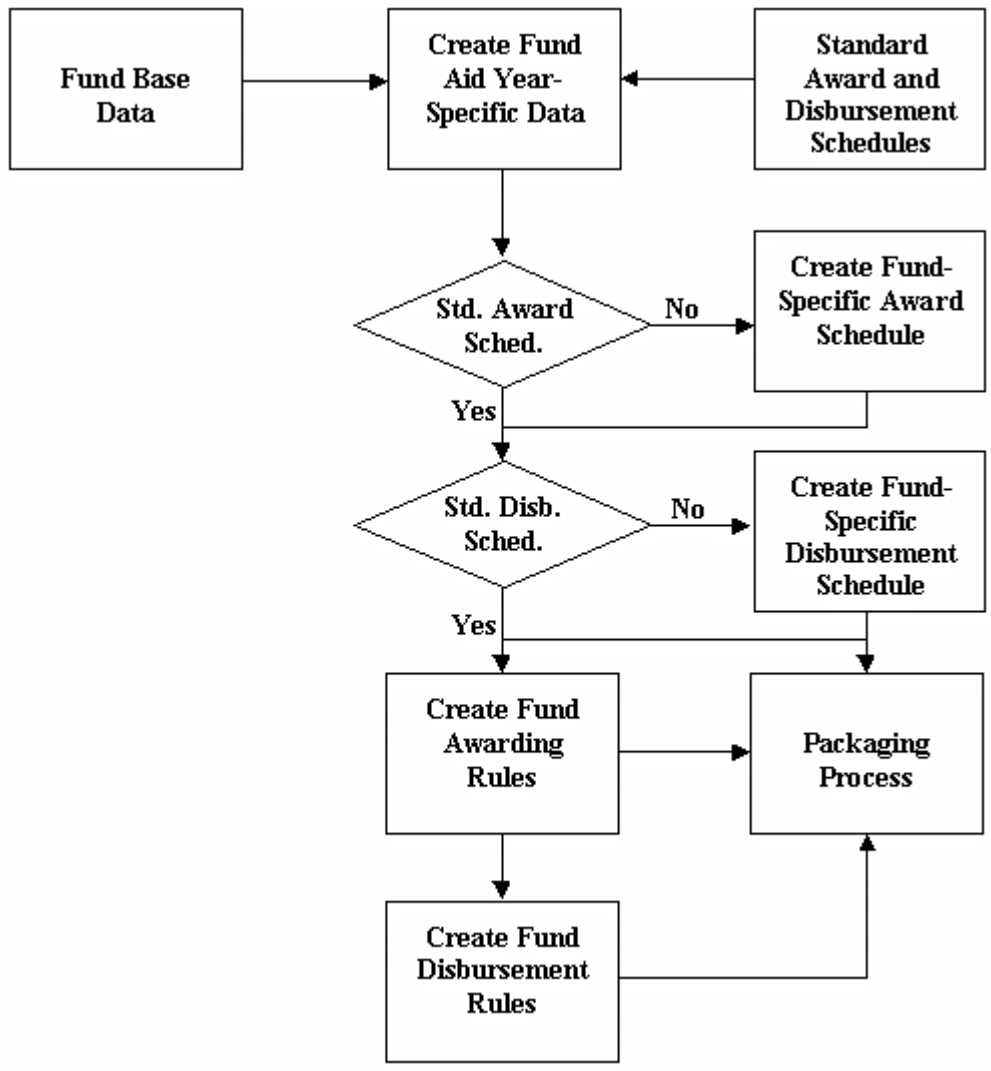
Seven-character name	Proper name of form, process, report, or table
RFRBASE	Fund Base Data Table
RFRBCMP	Fund/Budget Component Table
RFRFFID	Federal Fund ID Table

Processes and procedures

There are no processes in Funds Management other than procedures for the functional staff to follow. They may need assistance with RORRULEs.

Funds Management Process Flow

Diagram



Packaging and Disbursement Forms and Tables

Packaging and disbursement

The Packaging/Disbursements processes match an applicant's need with funds, determine an appropriate "package" for the applicant and record the disbursement of the funds.

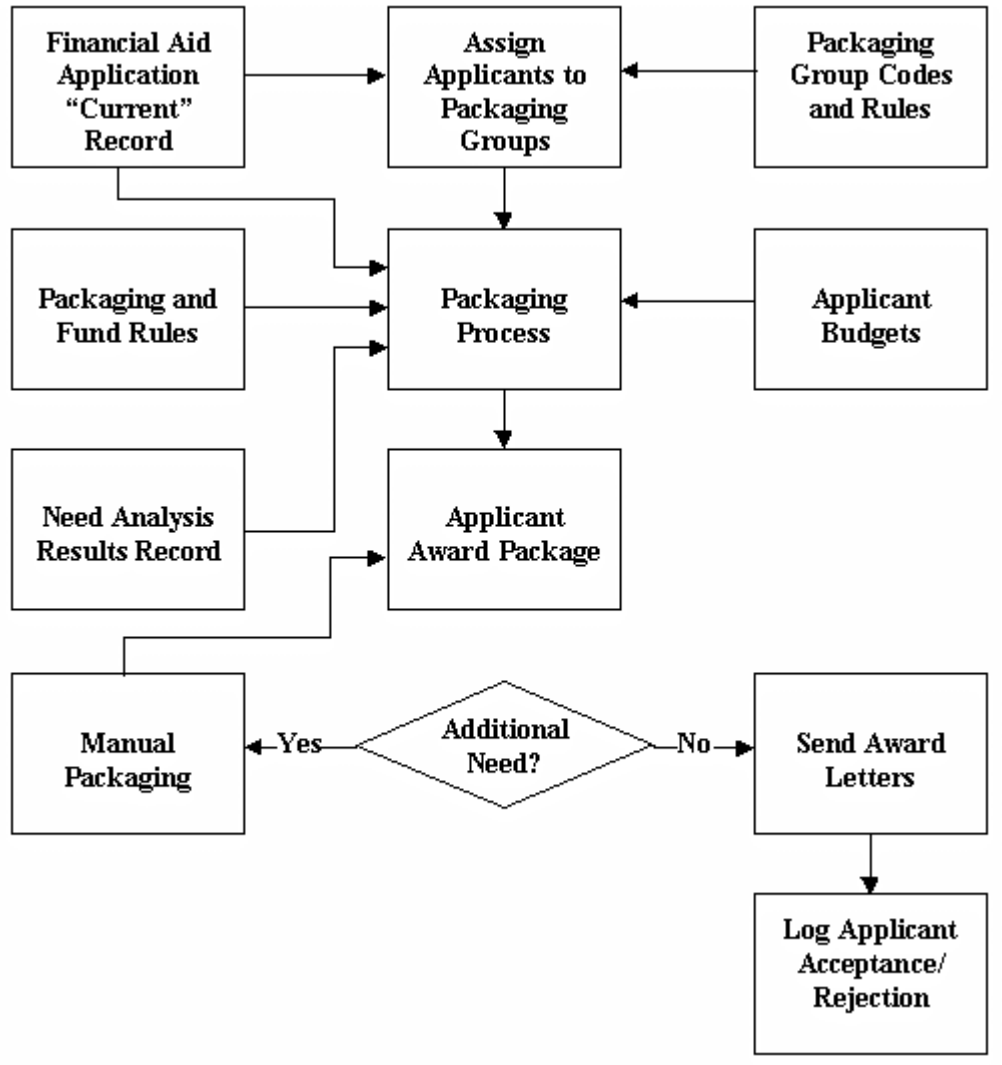
Seven-character name	Proper name of form, process, report, or table
RPAAPMT	Package Maintenance Form
RPAAWRD	Award Form
ROARMAN	Financial Aid Record Maintenance
RPAMACC	Award Acceptance Mass Entry Form
RPAMOFF	Award Offer Mass Entry Form
RPAARSC	Resource Form
RHACOMM	Applicant Comments Form
ROAIMMP	Applicant Immediate Process Form
RPIARPY	Contracts and Exemptions Payment Inquiry Form
RPIATRM	Applicant Award by Term Form
ROIDISB	Disbursement Results Form

Major tables

Seven-character name	Proper name of form, process, report, or table
RPRAWRD	Applicant Award table
RPRATRM	Applicant Award by Term table
RPRLAPP	Loan Application table

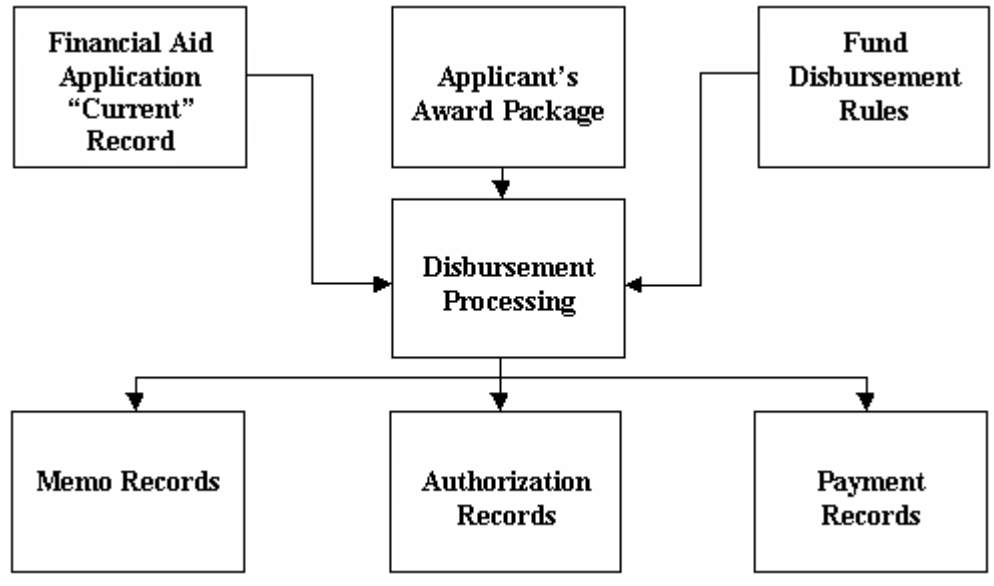
Packaging Process Flow

Diagram



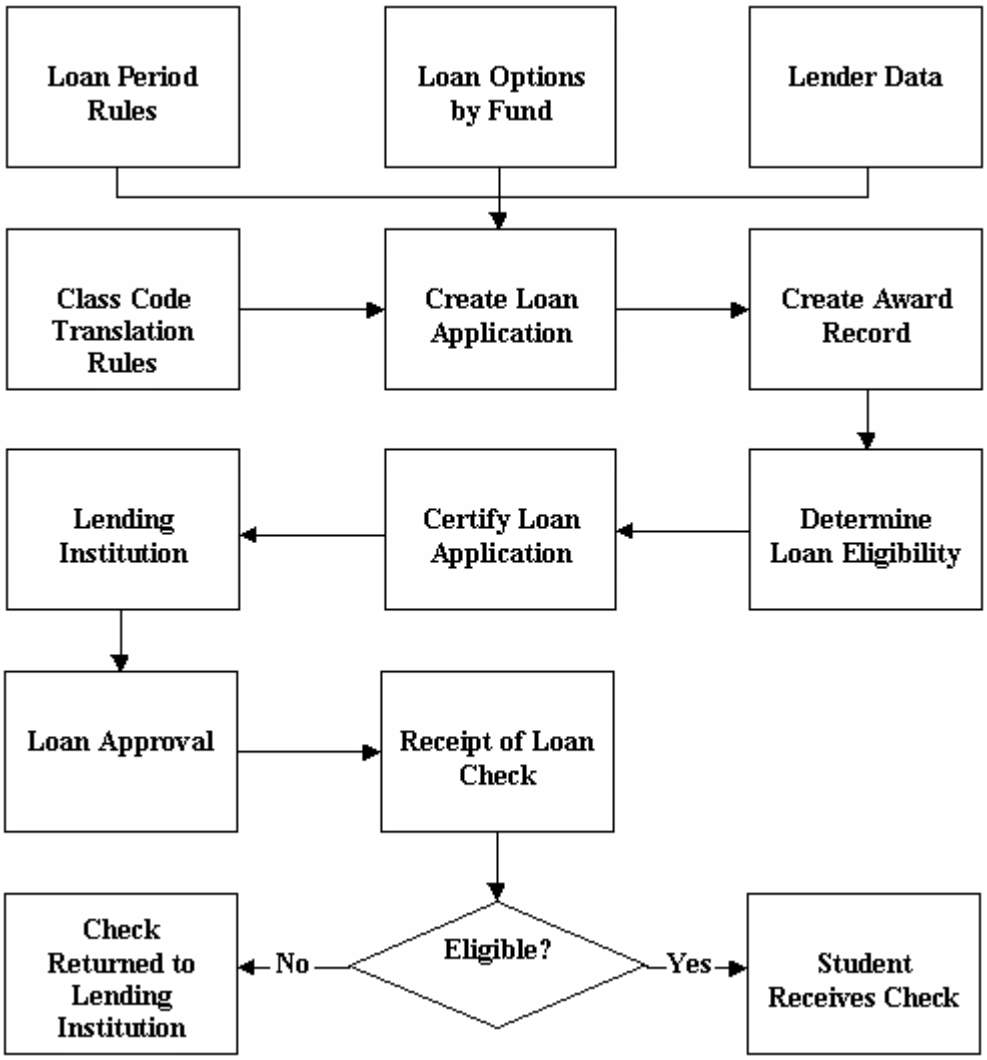
Disbursement Process Flow

Diagram



Loan Process Flow

Diagram



Packaging Process (RPEPCKG)

Packaging process

- Actual or Simulation
- RPBPDRV creates reports:
  - **RPBAWRD.out** – The Award Report that results from the packaging run
  - **RPBFUND.out** – The Fund Report that results from the packaging run

Pell Grant Calculation Process (RPEPELL)

RPEPELL

- Online, batch or from database trigger
- Triggers when certain data changes on the following forms:
  - RNARSLT, RBAABUD, RNASUxx, RNANAxx and ROAPELL

Online Award Validation Process (RPOVLDT)

RPOVLDT

This process validates all awards within an applicant's package to ensure that no changes made to the applicant or the fund(s) invalidate the award(s).

Running this process ascertains whether the applicant is eligible for an individual fund being added to the applicant's package either online or during the Packaging process.

The process also validates that the applicant is eligible for system or manual disbursements from the awards within the applicant's package.

Batch Validation Process (RPBVLDT)

RPBVLDT

This process validates all awards within an applicant's package to ensure that no changes made to the applicant or the fund(s) invalidate the award(s).

Running this process ascertains whether the applicant is eligible for an individual fund being added to the applicant's package either online or during the Packaging process.

The process also validates that the applicant is eligible for system or manual disbursements from the awards within the applicant's package.

Disbursement Process (RPEDISB)

RPEDISB

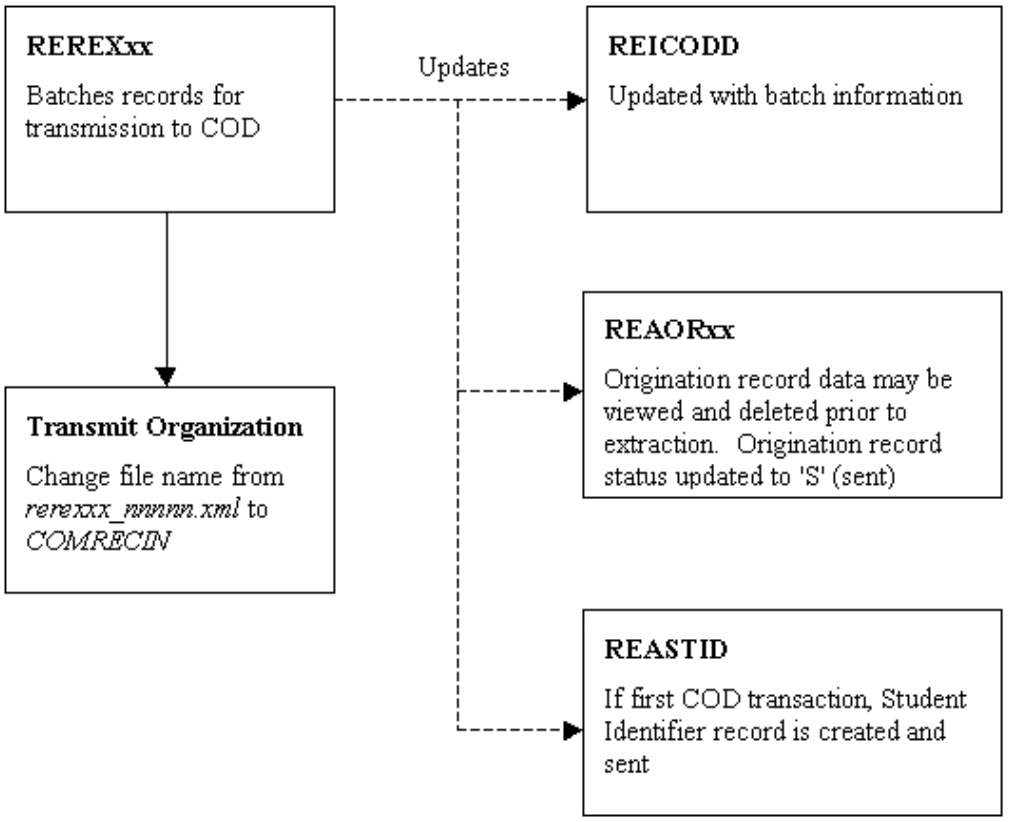
This process passes the amount of deferred Financial Aid available to an applicant within a specific term to the SCT Banner Student System. This is displayed as a memo transaction in the Student Billing module.

The process passes the amount of Financial Aid available to be disbursed to an applicant within a specific term to the SCT Banner Student System. This is displayed as an authorization in the Student Billing module.

The process also passes the amount of Financial Aid scheduled to be disbursed to an applicant within a specific term to the SCT Banner Student System. All scheduled disbursements with a date less than or equal to the processing date that have not been disbursed will be processed. These are displayed as payment transactions in the Student Billing module.

Pell Origination – Extract

Diagram


REREXxx
Batches records for transmission to COD
Updates
REICODD
Updated with batch information
Transmit Organization
Change file name from rerexxx_nnnnn.xml to COMRECIN
REAORxx
Origination record data may be viewed and deleted prior to extraction. Origination record status updated to 'S' (sent)
REASTID
If first COD transaction, Student Identifier record is created and sent

COD Extract Process (REREXxx)

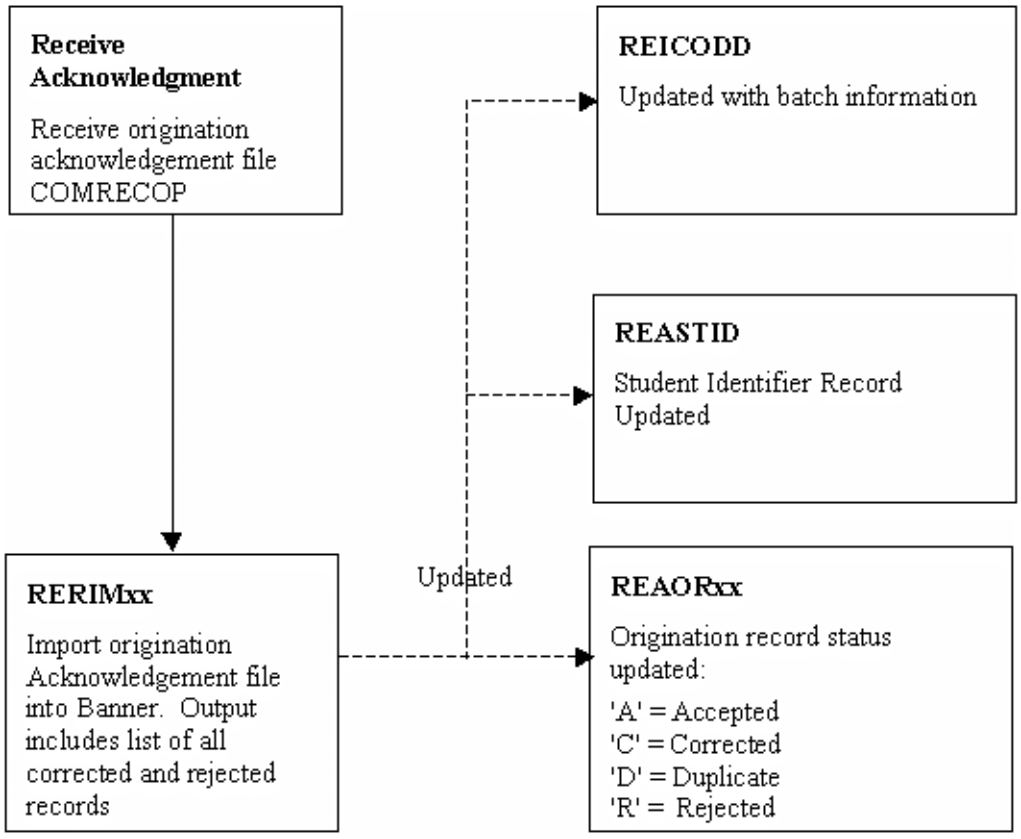
- Process extracts
  - Origination Data
  - Student Identifier Record
- Process updates
  - Origination Record (REAORxx)
  - Student Identifier Record (REASTID)
  - COD Document Control (REICODD)

Send Origination File to COD

- Access FTP software
- Move rerex04_nnnnn.xml file from jobsub to a local PC
- Rename rerex04_nnnnn.xml file to COMRECIN
- Upload COMRECIN file to COD website

Pell Origination – Import

Diagram



COD File Import Process (RERIMxx)

- Loads the acknowledgement files received from COD into SCT Banner
- FTP the COMRECOP file into the dataload directory
- COD File Import Process updates
  - Origination Record (REAORxx)
  - Student Identifier Record (REASTID)
  - COD Document Control (REICODD)

Review Pell Origination and disbursement document IDs

- COD Document Control (REICODD)
  - Monitors status of all data batches for Pell and Direct Lending
  - Includes batches sent and received

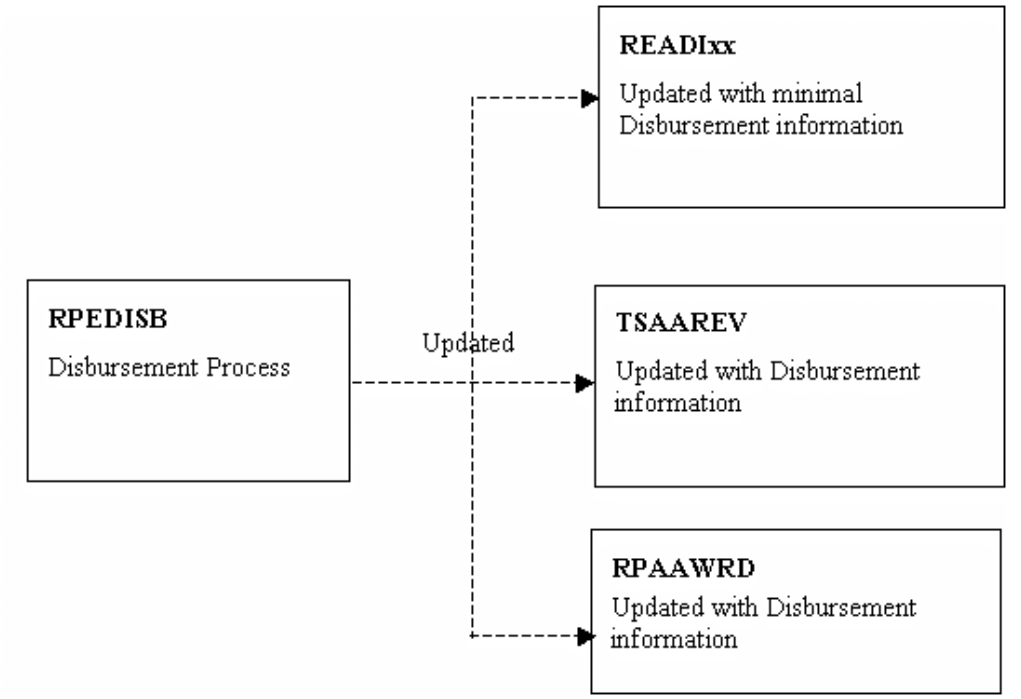
Pell Origination – Resend

Resend a Pell Origination batch

- COD Extract Process (REREXxx)
  - Enter Document ID on parameter 13
  - Resets Document ID on student records that are included in the original batch

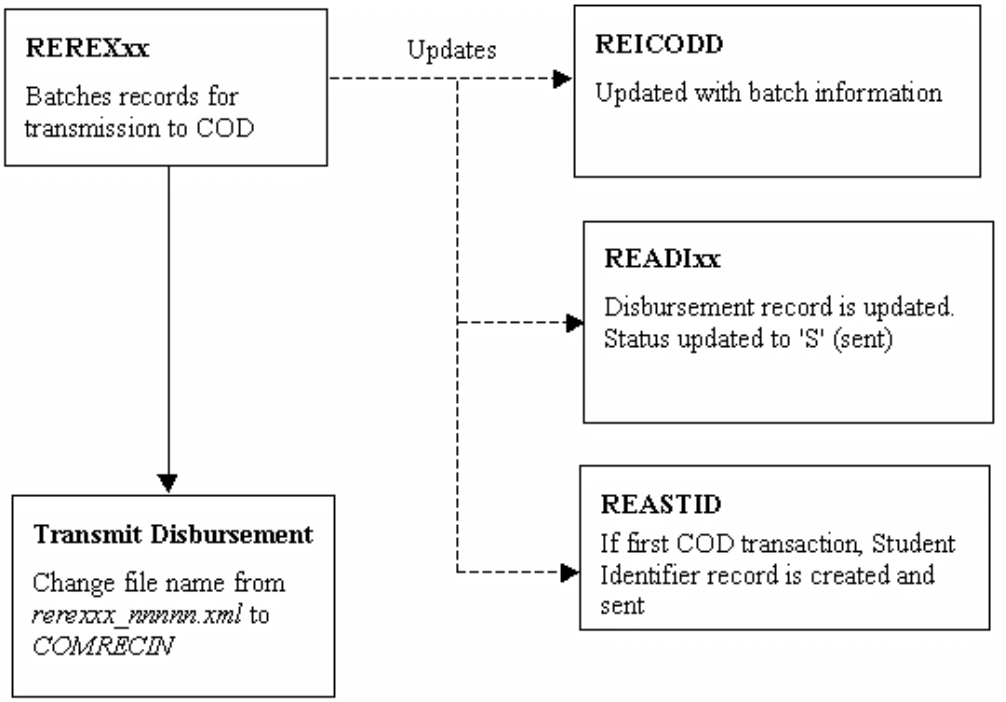
Pell Disbursement

Diagram



Pell Disbursement – Extract

Diagram


REREXxx
Batches records for transmission to COD
Updates
REICODD
Updated with batch information
READIxx
Disbursement record is updated. Status updated to 'S' (sent)
REASTID
If first COD transaction, Student Identifier record is created and sent
Transmit Disbursement
Change file name from rerexxx_nnnnn.xml to COMRECIN

COD Extract Process (REREXxx)

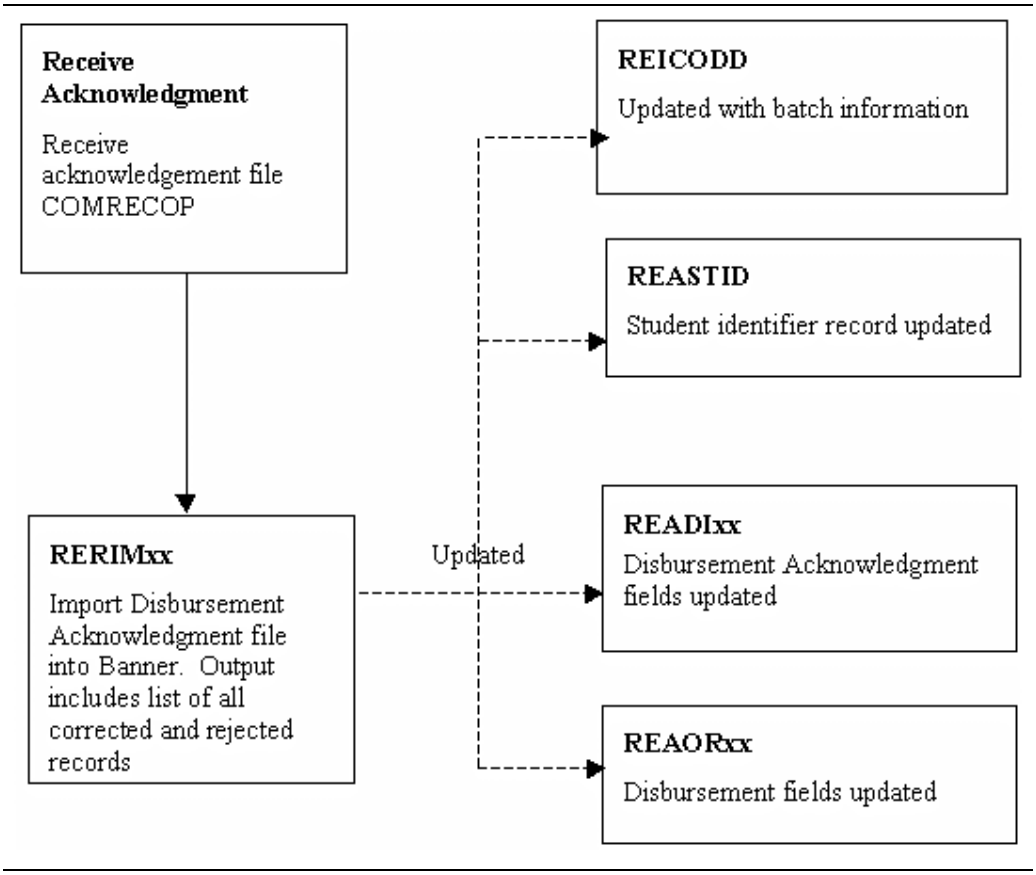
- Creates and extracts COD disbursement records for all Pell records where there is a payment and the COD disbursement record has not been sent
- Will not create / extract until the Student Identifier is acknowledged
- Updates:
  - Disbursement/Acknowledgement Form (READIxx)
  - Student Identifier Record (REASTID)
  - COD Document Control (REICODD)

Send Disbursement File to COD

- Access FTP software
- Move rerex04_nnnnn.xml file from jobsub to a local PC
- Rename rerex04_nnnnn.xml file to COMRECIN
- Upload COMRECIN file to COD website

Pell Disbursement – Import

Diagram



Data Request – Extract

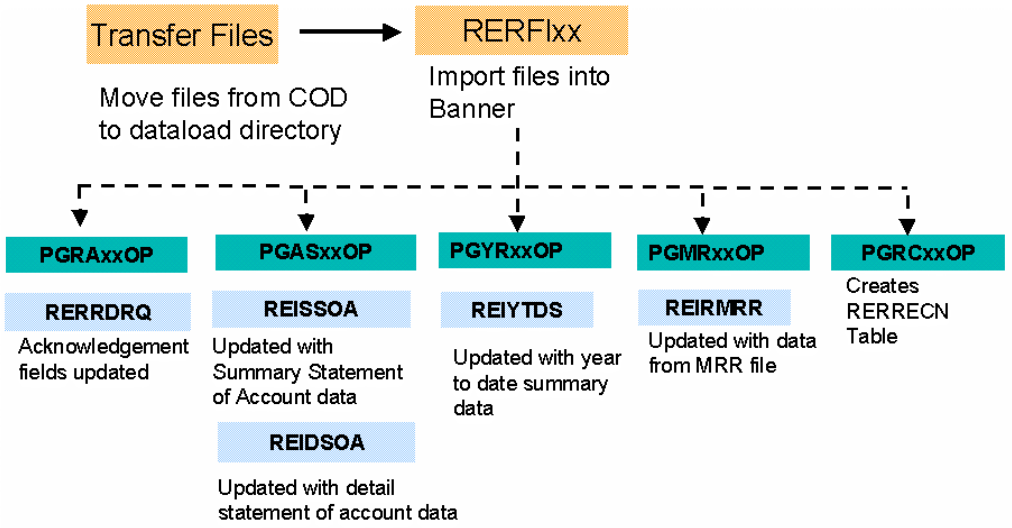
Requesting MRR records

It is better to only load the MRR records the COD sends to you and not request MRR records.

It is highly recommended that discretion be used when requesting MRR records. For example, never request all Origination Records for all your students or all institutions. There are many schools that originate for every ISIR that they receive; if you request records in this way, you may receive thousands of records.

Data Request – Import

Diagram



RFMS Import Process (RERFIxx)

RFMS Import Process (RERFIxx) loads the following records into Banner:

- Data Request Acknowledgement (PGRAxxOP)
- Year-to-Date Records (PGYRxxOP)
- Statements of Account (PGASxxOP)
- Multiple Reporting Records (PGMRxxOP)
- Reconciliation Files (PGRCxxOP)

Reports and Inquiries

Pell RFMS Miscellaneous Report (RERPELL)	• Used to help identify exception-processing requirements
	• Available data include:
	  • All MRR records
	  • Year-to-Date reporting
	  • Just in Time, no disbursement
	  • Just in Time, no charge
	  • More….

Review multiple reporting record data (REIRMRR)	• Used to view a student's multiple reporting record status and to identify any open issues for the student
Summary Statement of Account Inquiry Form (REISSOA)	• Accesses the summary statement of the Electronic Statement of Account (ESOA) data online
Detail Statement of Account Inquiry Form (REIDSOA)	• Accesses the detail statement of the Electronic Statement of Account (ESOA) data online

Common Functions Forms

Forms

These are general functions that support all of the other Financial Aid processes.

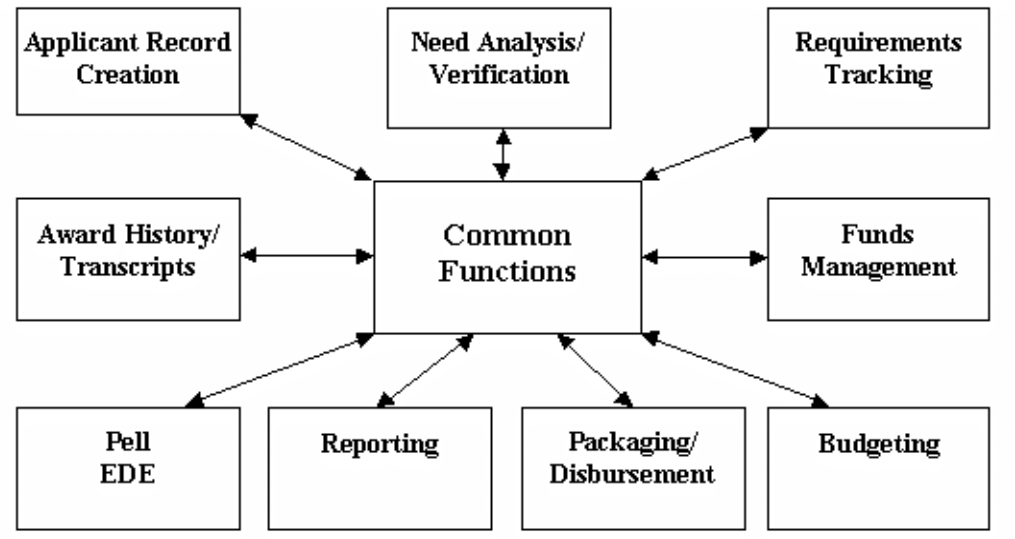
Seven-character name	Proper name of form, process, report, or table
RPAIDEN	Financial Aid Identification Form
ROAIDEN	Person Name/ID Search Form
ROAPERS	Financial Aid General Person Form
ROIAIDY	Aid Year Inquiry Form
ROIILOG	Data Log Inquiry Form
ROISAPR	SAP Code Inquiry Form
ROISARI	SAR ID Inquiry Form
ROAFSAP	FISAP Person Maintenance Form
ROIALOG	Applicant Data Log Inquiry Form
ROAALOG	Applicant Data Log Application Form

Major tables

Seven-character name	Proper name of form, process, report, or table
RORSTAT	Applicant Status Table
RORPELL	PELL Grant Payment Schedule Table
RORHOLD	Applicant Holds Table
RORDVAL	Audit Log Form/Data Code Table
ROBALOG	Audit Log Table
ROBUSDF	Applicant User-Defined Data Table
RORCMPL	Selection Identifier Compiled Statements
RORSAPR	Satisfactory Academic Progress Rules Table
RORMESG	Financial Aid Messages
RORENRL	Financial Aid Enrollment Table
RORCRHR	Credit Hours Table
ROBINST	Financial Aid Institution Table
RORGSQL	Generated SQL Selection Identifier Table

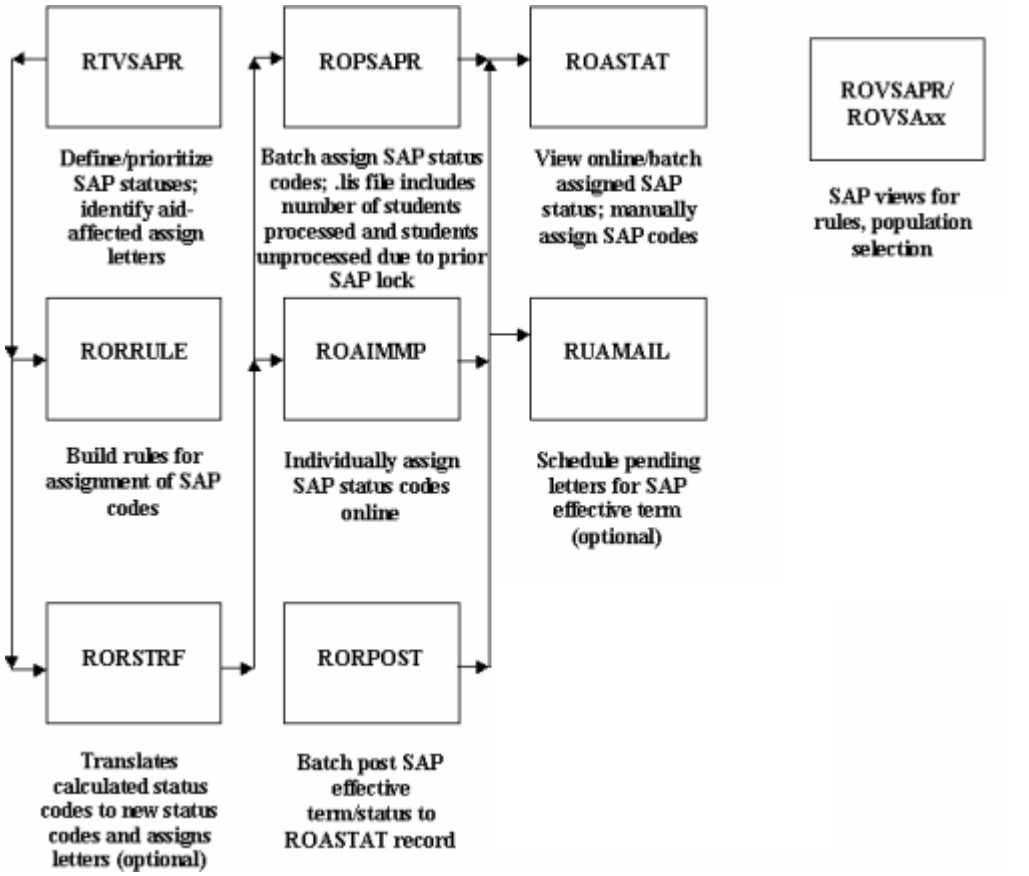
Common Functions Process Flow

Diagram



Satisfactory Academic Progress Process

Diagram


RTVSAPR
Define/prioritize SAP statuses; identify aid-affected assign letters
ROPSAPR
Batch assign SAP status codes; .lis file includes number of students processed and students unprocessed due to prior SAP lock
ROASTAT
View online/batch assigned SAP status; manually assign SAP codes
ROVSAPR/ ROVSAxx
SAP views for rules, population selection
RORRULE
Build rules for assignment of SAP codes
ROAIMMP
Individually assign SAP status codes online
RUAMAIL
Schedule pending letters for SAP effective term (optional)
RORSTRF
Translates calculated status codes to new status codes and assigns letters (optional)
RORPOST
Batch post SAP effective term/status to ROASTAT record

Reporting

Reporting module	The Reporting module contains standardized reports that extract data from all other Financial Aid modules.
Commonly used reports	Financial Aid Roll Rule Report (ROPROLL) • Create the scripts that rolls year rules • By aid year (Group, Fund, Budgeting, Tracking, Packaging) FISAP Report (RORFSxx) • Prints FISAP report
Other reports to know	• Disbursement Process (RPEDISB) • Pell Awarding Process (RPEPELL) • Packaging Process (RPEPCKG) • [Year-specific] Need Analysis Process (RNEINxx) • INAS

Award History and Transcripts

Forms

This module maintains historical applicant data and produces Financial Aid transcripts.

Seven-character name	Proper name of form, process, report, or table
RHRTRNS	Transcript Rules Form
RHAPBAW	Pre-Banner Award Summary Form
RHAPTRN	Prior Institution Transcript Form
RHIAFSH	Fund Sequence History Inquiry Form
RHACOMM	Applicant Comments Form
RHATINF	Transcript Information Form
RHARQST	Financial Aid Transcript Request Form

Student Employment

Forms

This module maintains data related to student employment financial assistance.

Seven-character name	Proper name of form, process, report, or table
RJASEAR	Student Employment Authorization Form
RJASERF	Student Employment Referral Form
RJASEME	Student Employment Mass Entry Form
RJISEWH	Student Employment Work History Form

Major tables

Seven-character name	Proper name of form, process, report, or table
RJBPLBD	Placement Base Data Table
RJBJOBT	Job Title Table
RJRSEAR	Student Employment Authorization Table
RJRSERF	Student Employment Referral Table
RJRSEWH	Student Employment Work History Table

Processes and procedures

Payroll Load Process (RJRLOAD)

- Interface payroll data from SCT Banner Human Resources to SCT Banner Financial Aid

Logging

Forms and tables

- Institution Financial Aid Options Form (ROAINST) (audit logging)
  - Budget logging
  - Needs Analysis logging
  - Packaging logging
  - Pell Correction logging
- Audit Log table (ROBALOG)

New Year Roll – 2005/2006

Objectives

- To review all of the steps required to roll selected aid year specific information from one aid year to the new aid year, including:
  - Creation of an 0506 ROAINST instance
  - Running the ROPROLL process from Job Submission
  - Manually reviewing and editing rules and validation tables FOLLOWING the roll

Warning

BEFORE your IT Department can possibly install the appropriate Banner New Aid Year release, you MUST first create an 0506 instance of ROAINST.

Considerations

Three very important considerations:

- Do NOT copy or manually enter rules for a module on the RORRULE form for 0506 before running the ROPROLL process
- Do NOT copy or manually enter 0506 data for a module that you wish to automatically roll to the 0506 aid year prior to running ROPROLL
- Wait to edit and/or manually update the 0506 year-specific data you want to automatically roll until AFTER the ROPROLL process has been performed

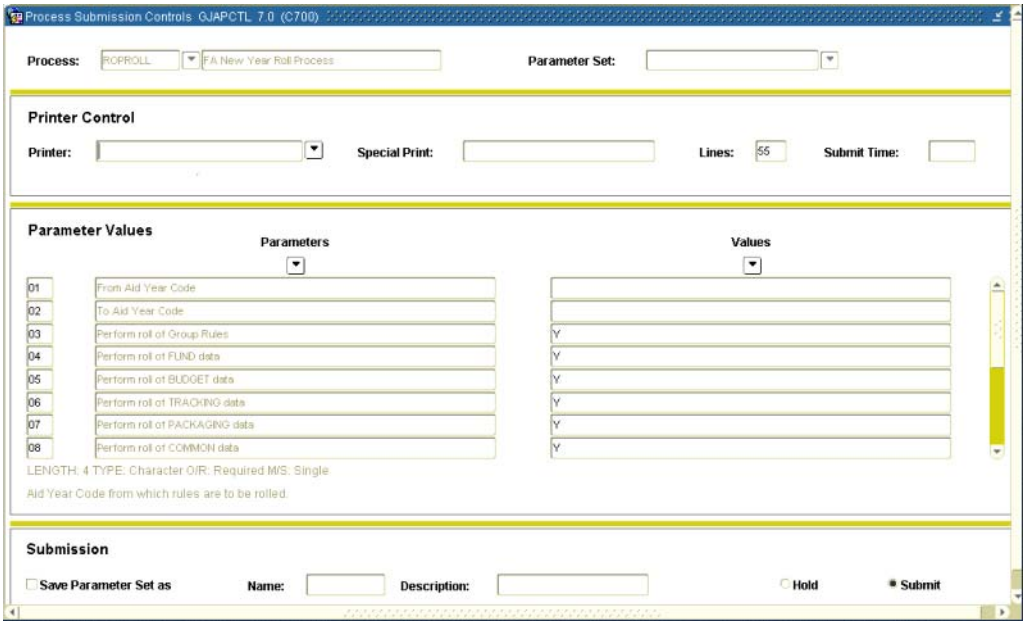
New Year Roll - ROPROLL

ROPROLL decisions

What data do you want to roll automatically?

	Parameter	Value
01	From Aid Year Code	ex. 0405
02	To Aid Year Code	ex. 0506
03	Perform roll of Group Rules	Y or N
04	Perform roll of FUND data	Y or N
05	Perform roll of BUDGET data	Y or N
06	Perform roll of TRACKING data	Y or N
07	Perform roll of PACKAGING data	Y or N
08	Perform roll of COMMON data	Y or N
09	Perform roll of EMPLYMENT data	Y or N

ROPROLL



New Year Roll – Forms, Tables and Modules

Common functions forms and data	- ROAINST - RTVTREQ - RTVTRST - STVTERM - RTVAPRD - RTVSAPR - RTVTGRP - RTVBGRP - RTVPGRP - STVLEVL - RORDATA - RORTPRD - RTVUSER - RORPOST - RCRINFR
Record creation module	• ROAINST • RCRINFR – Create Data Source Matching Rules • RTVINFC – Update Data Source Code • RCRTPTR – Review for accuracy • RPROPTS – Review Packaging and Disbursement options
Need analysis module	• RPROPTS – Check Packaging Fields for New Aid Year • ROAINST – Check for completion of 0506 Institutional Parameters • RORTPRD – Update with 0506 Aid Periods and Terms • RFRBASE – Review and Update Funds for 0506 • RFRMGMT – Review Funds Management Forms for 0506 • RPRCLSS – Review STVLEVL, STVCLAS and Banner Financial Aid Codes
Tracking validation tables and rules	• ROAINST – Review 0506 Tracking Parameters • RTVTGRP – Review Tracking Group Validation Form • RTVTREQ – Review and Edit Requirements Tracking Validation Form for 0506 • RRRGREQ – Update 0506 Tracking Group/Requirements and Rules • RORRULE – Create Group Assignment Rules for 0506 Using the Copy Function • RRRTMSG – Associate any new messages for 0506 to Tracking Requirement Codes

Continued on the next page

New Year Roll – Forms, Tables and Modules, Continued

Budgeting validation tables and rules	• ROAINST – Create 0506 Budget Defaults • RTVAPRD – Confirm Aid Periods for 0506 • RTVBTYP – Confirm 0506 Budget Types • RBRCOMP – Update Budgets for 0506 • RTVBGRP – Confirm 0506 Budget Groups • RBRGTYTP – Confirm 0506 Budget Types • RORMESG – Associate Budget Messages created on RTVMESG with Budget Groups • RORRULE – Create 0506 Budget Group Assignment Rules
Funds Management validation tables and rules	• ROAINST • RFRBASE – Update FUNDS for the 0506 Aid Year • RFRMGMT – Build 0506 Aid-year Specific Data and Rules for Each Fund You Intend to Use (Initial Page of RFRMGMT Form does NOT roll) • RFRDEFA – Create Term Award and Disbursement Schedules for 0506 by Aid Period • RFRASCH – Create OPTIONAL Term Award and Disbursement Schedules for the 0506 Aid Year • RORRULE – Create OPTIONAL Fund Awarding Rules for 0506 by Fund Code

Continued on the next page

New Year Roll – Forms, Tables and Modules, Continued

Packaging and disbursement	• ROAINST – Confirm that Full-Time, Half-Time, ¾-Time Values are associated with EACH STVTERM Code and EACH STVLEVL code for 0506 (pg. 4) • RPROPTS – Create 0506 Packaging and Disbursement Options • RTVPGRP – Confirm 0506 Packaging Groups • RPRGFND – Associate 0506 Packaging Groups with Funds, indicating the Priority Order and Respective Minimum and Maximum Awards • RPRCLSS – Create Class Code Translations for Disbursements • RORRULE – Create Packaging Group Assignment Rules for 0506 if using Automated Packaging • RPRDEFR – OPTIONAL Set-up for Institutions Using Self-Help, Gap or Equity Packaging • RPRPCKR – Create Self-Help, Gap or Equity Packaging Rules if pertinent to Packaging Philosophy • RPRAUDT – Create OPTIONAL rules for Audit Grading Mode if using Adjusted Enrollment Hrs. • RORRULE – Create 0506 OPTIONAL Group/Fund Awarding Rules • RPREXPT / RPRCONT – Create OPTIONAL Exemption Interface Rules and/or Contract Interface Rules • RPRFSRC – Create OPTIONAL Fund Source Maximum Rules for 0506
Loan module	• ROAINST – Update 0506 Institutional Loan Parameters • RPRLOPT – Create 0506 Packaging and Disbursement Options for Each Loan Fund • RPRLPRD – Create 0506 Loan Periods • RFRMGMT – Verify that the Loan Process Indicator is Checked for Each Loan Fund to be Awarded in 0506 • RPRLNDR – Review Lender Information and Update for 0506
EDE module	• ROAINST – Update EDE Corrections Indicator form, and Complete Pell, COD and Commonline Windows for 0506 • RORDATA – Verify Presence This SCT-Delivered Table. Modifications to RORDATA Are NOT Recommended

New Year Roll – Summary

Summary

Three steps to roll Aid Year data:

- Create an '0506' instance of ROAINST prior to installation of new year release
- Run the ROPROLL process from Job Submission
- Review/Edit each of the Financial Aid modules listed in the New Year Start-up Checklist

Self Check

Directions

Use the information you have learned in this workbook to complete this self check activity.

Exercise 1: Applicant record creation

- Other than data load, how can new records be created?
- Explain what the process RCPDTMP does.

Exercise 2: RORRULE

Write a rule to capture in a tracking group those individuals that have a 'C' code on their current records. You will need to create a tracking group and tracking code. To complete this assignment, you should be able to run ROBBGRP and place a requirement on student records that fit the above category.

Exercise 3: Packaging and disbursement

Write a script that will list the student ID, aid year, fund code, and Paid Award Amount for a student whose ID and aid year are entered as parameters.

Continued on the next page

Self Check, Continued

Exercise 4: SAP History

Write a script to select ID, name, progress code, and term for each student coded in Banner for Satisfactory Academic Progress.

Some students are coded for more than one term.

If students have more than one term, select the most current term and select that term's progress code.

The academic progress table is RORSAPR.

Continued on the next page

Self Check, Continued

Exercise 5

Write a script to list the student ID, aid year, term code, fund description, and offered award amount for the term of a student whose ID and term code is entered as a parameter. Allow for the use of wild card entry for both ID and term code.

Continued on the next page

Self Check, Continued

Exercise 6: Database Structure

Write a script to return those students that have different EFCs. Script should return student ID, formatted name, EFCs and indicate if record has a 'lock'. Prompt the user for aid year.

Continued on the next page

Self Check, Continued

Exercise 7: Database Structure Advanced

Write a script to select ID, name, unmet need, EFC, FWS work preference, and total paid awards for each student. Use wild card selection for aid year.

Continued on the next page

Self Check, Continued

Exercise 8: Database Structure Advanced

Modify your script from the previous exercise to select only students that indicated they wanted FWS for 1998-99.

Continued on the next page

Self Check, Continued

Exercise 9: Database Structure Advanced

Modify your script from the previous exercise to select students where they have any awards paid for aid year.

Self Check – Answer Key

Exercise 1: Applicant record creation

- Other than data load, how can new records be created?

New records can be created on RRAAREQ, RNANAxx, or ROASTAT.

- Explain what the process RCPDTMP does.

It cleans out the temporary data load tables.

Exercise 2: RORRULE

Write a rule to capture in a tracking group those individuals that have a 'C' code on their current records. You will need to create a tracking group and tracking code. To complete this assignment, you should be able to run ROBBGRP and place a requirement on student records that fit the above category.

- **Create code on RTVTREQ**
- **Create Group on RTVTGRP**
- **Find field on RNARSLT: RCRAPP2_ELIGIBILITY_IND = '1'**
- **Write RORRULE:**

```
RCRAPP2_ELIGIBILITY_IND = '1' and
RCRAPP1_CURR_REC_IND = 'Y'
```

- **Save, Compile, Execute Group to test.**
- **Run ROBBGRP.**

Exercise 3: Packaging and disbursement

Write a script that will list the student ID, aid year, fund code, and Paid Award Amount for a student whose aid year is entered as a parameter.

```
select spriden_id id,
       rprawrd_aidy_code aidyr,
       rprawrd_fund_code fund_code,
       '$'||rprawrd_paid_amt pd_amount
  from spriden, spbpers, rprawrd
 where spriden_pidm = rprawrd_pidm
   and spbpers_pidm = spriden_pidm
   and spbpers_dead_ind is null
   and spriden_change_ind is null
   and spriden_entity_ind = 'P'
   and rprawrd_paid_amt is not null
   and rprawrd_aidy_code = '&aidyr';
```

Continued on the next page

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Exercise 4: SAP History

Write a script to select ID, name, progress code, and term for each student coded in Banner for Satisfactory Academic Progress.

Some students are coded for more than one term.

If students have more than one term, select the most current term and select that term's progress code.

The academic progress table is RORSAPR.

```
set pagesize 60
set linesize 80
rem
column ID format a9
column NAME format a30
column TERM format a8
column CODE format a8
rem
spool PROGRESS.lis
rem
select  spriden_id "ID",
        spriden_last_name|| ','
        ||spriden_first_name "NAME",
        x.rorsapr_term_code "TERM",
        x.rorsapr_sapr_code "CODE"
  from  spriden, spbpers, rorsapr x
 where  x.rorsapr_term_code =
                (select max(y.rorsapr_term_code)
                   from rorsapr y
                  where y.rorsapr_pidm = x.rorsapr_pidm)
   and  x.rorsapr_pidm = spriden_pidm
   and  x.rorsapr_pidm = spbpers_pidm(+)
   and  spbpers_dead_ind is null
   and  spriden_change_ind is null
   and  spriden_entity_ind = 'P'
 order  by 2
/
spool off
```

Continued on the next page

Self Check – Answer Key, Continued

Exercise 5

Write a script to list the student ID, aid year, term code, fund description, and offered award amount for the term of a student whose term code is entered as a parameter. Allow for the use of wild card entry for term code.

```
select spriden_id  id,
       rpratrm_aidy_code aidy,
       rpratrm_term_code term_code,
       rfrbase_fund_title fund_desc,
      '$'||rpratrm_offer_amt  offered_amt
  from rfrbase, spbpers, rpratrm, spriden
 where spriden_pidm = rpratrm_pidm
   and rpratrm_pidm = spbpers_pidm
   and rpratrm_fund_code = rfrbase_fund_code
   and spbpers_dead_ind is null
   and spriden_change_ind is null
   and spriden_entity_ind = 'P'
   and rpratrm_term_code like '&term_code'
 order by spriden_id, rpratrm_aidy_code,
          rpratrm_term_code, rpratrm_fund_code
/
```

Continued on the next page

Self Check – Answer Key, Continued

Exercise 6: Database Structure

Write a script to return those students that have different EFCs. Script should return student ID, formatted name, EFCs and indicate if record has a 'lock'. Prompt the user for aid year.

```
set linesize 100
column name format a30 head 'Student Name'
column locked format a9 head 'Locked?'
select spriden_id ID,
       f_format_name(spriden_pidm,'LF30') Name,
       rcvappl_pell_pgi SAR_EFC,
       rcvappl_pgi Pell_EFC,
       rcvappl_tfc SYS_EFC,
       rcvappl_used_trans_no Trans,
       rorstat_lock_ind Locked
  from rcvappl, rorstat, spriden
 where rcvappl_pidm = rorstat_pidm
   and rorstat_pidm = spriden_pidm
   and spriden_change_ind is null
   and spriden_entity_ind = 'P'
   and rcvappl_aidy_code = rorstat_aidy_code
   and rcvappl_infc_code = 'EDE'
   and rcvappl_aidy_code = '&Aid_Year'
   and rcvappl_curr_rec_ind = 'Y'
   and (rcvappl_tfc <> rcvappl_pgi or
        rcvappl_tfc <> rcvappl_pell_pgi or
        rcvappl_pgi <> rcvappl_pell_pgi)
 order by name;
```

Continued on the next page

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Self Check – Answer Key, Continued

Exercise 7: Database Structure Advanced

Write a script to select ID, name, unmet need, EFC, FWS work preference, and total paid awards for each student. Use wild card selection for aid year.

```
set pagesize 60
set linesize 80
rem
column ID format a9
column NAME format a30
column EFC format 99,990
column UNMET_NEED format 99,990
column WORK format a6
column PAID_AMT format 99,990
rem
spool NEED.lis
rem
select  spriden_id "ID", spriden_last_name|| ', '
        ||spriden_first_name "NAME",
        rorstat_pri_sar_pgi "EFC",
        rorstat_unmet_need "UNMET_NEED",
        rcrapp4_work_study "WORK",
        sum(rprawrd_paid_amt) "PAID_AMT"
  from  spriden, spbpers, rprawrd, rorstat, rcrapp4,
        rcrapp1
 where  rcrapp1_aidy_code = '&aidy_code'
   and  rcrapp1_curr_rec_ind = 'Y'
   and  rcrapp1_pidm = rcrapp4_pidm
   and  rcrapp1_infc_code = rcrapp4_infc_code
   and  rcrapp1_seq_no = rcrapp4_seq_no
   and  rcrapp1_aidy_code = rcrapp4_aidy_code
   and  rcrapp1_pidm = rorstat_pidm
   and  rcrapp1_aidy_code = rorstat_aidy_code
   and  rcrapp1_pidm = rprawrd_pidm
   and  rcrapp1_pidm = spbpers_pidm(+)
   and  rcrapp1_pidm = spriden_pidm
   and  spbpers_dead_ind is null
   and  spriden_change_ind is null
   and  spriden_entity_ind = 'P'
 group  by spriden_id, spriden_last_name,
        spriden_first_name, rorstat_pri_sar_pgi,
        rorstat_unmet_need, rcrapp4_work_study
 order  by 2
/
spool off
```

Continued on the next page

Exercise 8: Database Structure Advanced

Modify your script from the previous exercise to select only students that indicated they wanted FWS for 1998-99.

```
set pagesize 60
set linesize 80
rem
column ID format a9
column NAME format a30
column EFC format 99,990
column UNMET_NEED format 99,990
column WORK format a6
column PAID_AMT format 99,990
rem
spool FWS.lis
rem
select  spriden_id "ID", spriden_last_name|| ','
        ||spriden_first_name "NAME",
        rorstat_pri_sar_pgi "EFC",
        rorstat_unmet_need "UNMET_NEED",
        rcrapp4_work_study "WORK",
        sum(rprawrd_paid_amt) "PAID_AMT"
  from  spriden, spbpers, rprawrd, rorstat, rcrapp4,
        rcrapp1
 where  rcrapp1_aidy_code = '&aidy_code'
   and  rcrapp1_curr_rec_ind = 'Y'
   and  rcrapp1_pidm = rcrapp4_pidm
   and  rcrapp1_infc_code = rcrapp4_infc_code
   and  rcrapp1_seq_no = rcrapp4_seq_no
   and  rcrapp1_aidy_code = rcrapp4_aidy_code
   and  rcrapp1_pidm = rorstat_pidm
   and  rcrapp1_aidy_code = rorstat_aidy_code
   and  rcrapp1_pidm = rprawrd_pidm
   and  rcrapp1_pidm = spbpers_pidm(+)
   and  rcrapp1_pidm = spriden_pidm
   and  spbpers_dead_ind is null
   and  spriden_change_ind is null
   and  spriden_entity_ind = 'P'
   and  rcrapp4_work_study = '1'
 group  by spriden_id, spriden_last_name,
        spriden_first_name, rorstat_pri_sar_pgi,
        rorstat_unmet_need, rcrapp4_work_study
 order  by 2
/
spool off
```

Continued on the next page

Exercise 9: Database Structure Advanced

Modify your script from the previous exercise to select students where they have any awards paid for aid year.

```
set pagesize 60
set linesize 80
rem
column ID format a9
column NAME format a30
column EFC format 99,990
column UNMET_NEED format 99,990
column WORK format a6
column PAID_AMT format 99,990
rem
spool AWARDS.lis
rem
select  spriden_id "ID", spriden_last_name|| ','
        ||spriden_first_name "NAME",
        rorstat_pri_sar_pgi "EFC",
        rorstat_unmet_need "UNMET_NEED",
        rcrapp4_work_study "WORK",
        sum(rprawrd_paid_amt) "PAID_AMT"
  from  spriden, spbpers, rprawrd, rorstat, rcrapp4,
        rcrapp1
 where  rcrapp1_aidy_code = '&aidy_code'
   and  rcrapp1_curr_rec_ind = 'Y'
   and  rcrapp1_pidm = rcrapp4_pidm
   and  rcrapp1_infc_code = rcrapp4_infc_code
   and  rcrapp1_seq_no = rcrapp4_seq_no
   and  rcrapp1_aidy_code = rcrapp4_aidy_code
   and  rcrapp1_pidm = rorstat_pidm
   and  rcrapp1_aidy_code = rorstat_aidy_code
   and  rcrapp1_pidm = rprawrd_pidm
   and  rcrapp1_pidm = spbpers_pidm(+)
   and  rcrapp1_pidm = spriden_pidm
   and  spbpers_dead_ind is null
   and  spriden_change_ind is null
   and  spriden_entity_ind = 'P'
   and  rprawrd_paid_amt <> 0
 group  by spriden_id, spriden_last_name,
        spriden_first_name, rorstat_pri_sar_pgi,
        rorstat_unmet_need, rcrapp4_work_study
 order  by 2
/
spool off
```

Section E: Job Submission

Overview

In this section These topics are covered in this section.

Topic	Page
Job Submission Overview	E-2
Job Submission Process Flow	E-4
Job Submission at the Functional Level	E-5
Job Submission at the Database Level	E-6

Job Submission Overview

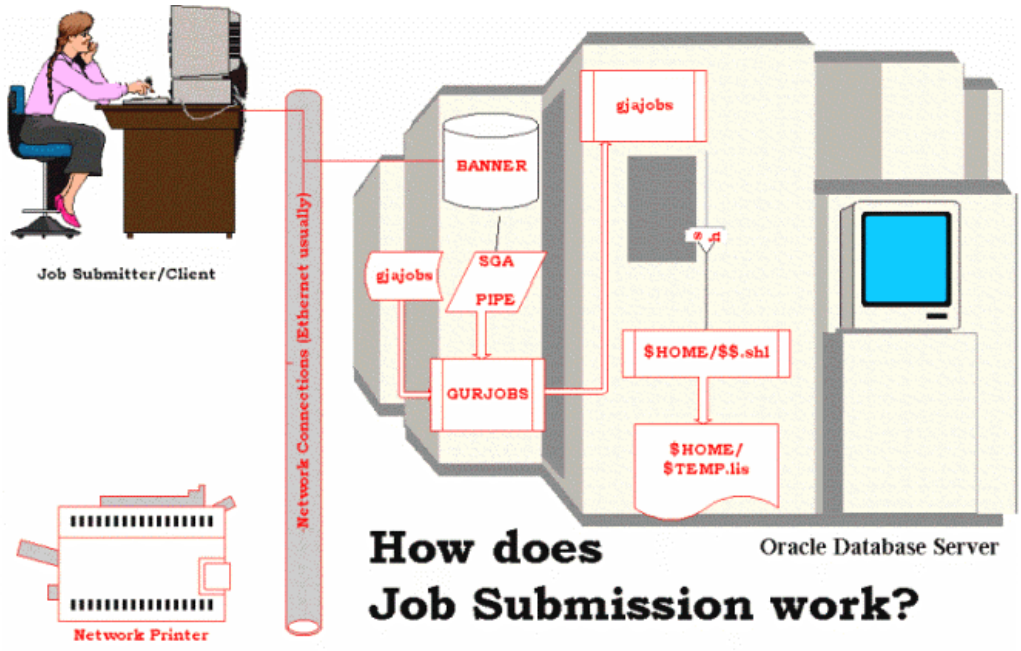
Description

The Job Submission process allows users to identify and define job parameters, work with job scheduling and printing, schedule jobs and control job printing.

How does Job Submission work?

- It defines the parameters used to execute any given process
- It communicates with the database server environment to schedule the process
- It communicates with the database server environment to print the output of the process

Diagram



JOBSUB ID

jobsub is a System user ID, not an Oracle user ID. *jobsub* starts Job Submission table (GURJOBS) for each database.

All reports (.lis files) reside in *jobsub*'s directory.

Continued on the next page

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Job Submission Overview, Continued

Start Job Submission-Sleep/Wake	GURJOBS is a PRO*C program created to handle requests in a client-server configuration. GURJOBS must be running in Sleep/Wake mode prior to Job Submission. The user ID *jobsub* should start this process. All output from Job Submission is owned by *jobsub*. GURJOBS is dependent upon the Oracle database pipe (dbmspipe.sql).
Establish printers	The Printer Validation Form (GTVPRNT) defines the printers that are accessible to users. Printers must be accessible from the network. The database server must know about the printer and the print queue. NOPRINT and DATABASE may be defined as printer codes, but do not route to a printer.
Define processes	The Process Maintenance Form (GJAJOBS) allows for maintenance of overall process attributes. • Process name • Process description • Process type (Pro*C, Pro*COBOL, etc.)
Define process parameters	Parameters for any given process can be maintained dynamically through SCT Banner forms. • Parameter Definitions Form (GJAPDEF) • Parameter Value Validations Form (GJAPVAL) • Default Parameter Value Validations Form (GJAPDFT)
Submit job	The Process Submission Controls Form (GJAPCTL) creates a one-up number to uniquely identify the job, and passes the user-entered parameters and the one-up number to the table GJBPRUN. At run time, all processes access GJBPRUN for their parameters.
Review results	The Process Results Form (GJARSLT) allows for the review of the process log.
Output files	All process output (.lis files) reside in the *jobsub* home directory. Log files (.log) also reside in the *jobsub* home directory.

Job Submission Process Flow

Process flow

1. Process Maintenance Form (GJAJOBS)
   - Define and maintain jobs

2. Parameter Definitions Form (GJAPDEF)
   - Name and define parameters

3. Default Parameter Value Validations Form (GJAPDFT)
   - Define default parameters

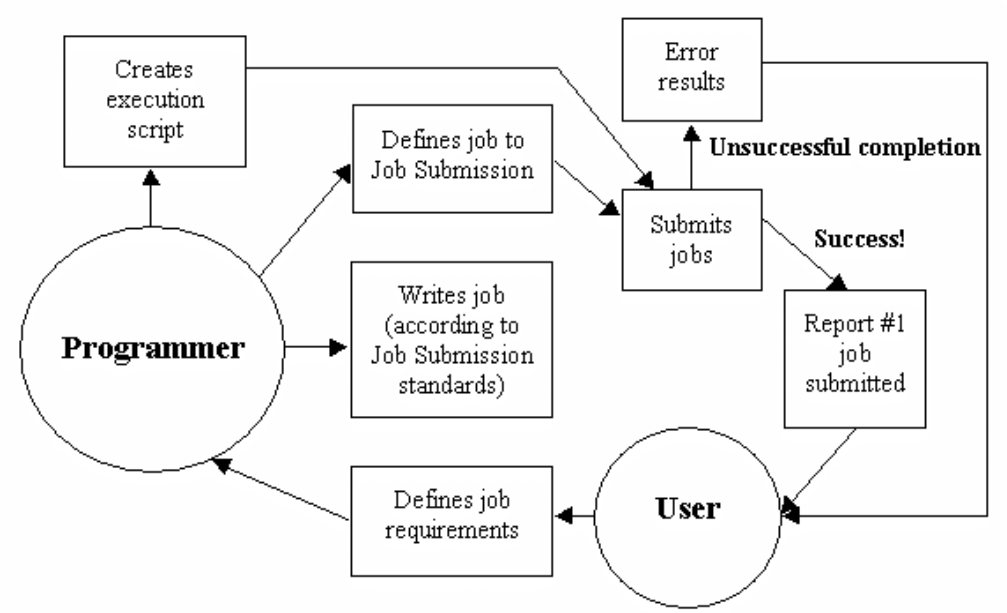
4. Parameter Value Validations Form (GJAPVAL)
   - Enter parameter values for a job

5. Process Submission Controls Form (GJAPCTL)
   - Run a job

6. Process Results Form (GJARSLT)
   - View the results of a job

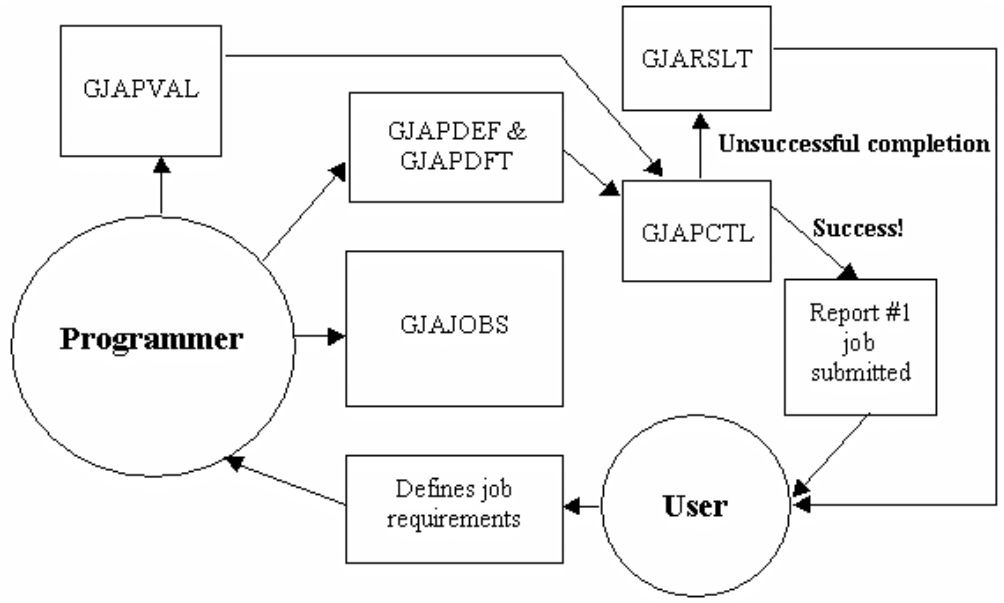
Job Submission at the Functional Level

Diagram



Job Submission at the Database Level

Diagram



Section F: Population Selection

Overview

In this section These topics are covered in this section.

Topic	Page
Population Selection Overview	F-2
Step 1: Identify an Application	F-3
Step 2: Define Criteria	F-4
Step 3: Extract the IDs	F-5
Step 4: Review Population Selection	F-6
Population Selection Process Flow	F-7
Self Check	F-8
Self Check – Answer Key	F-9

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Population Selection Overview

Description

Population Selection allows you to identify and group entities in the database, such as people, vendors, or organizations.

Population Selection extracts a subset of IDs for use in SCT Banner reports and letters, and allows processes to be run using that subset of IDs (such as people, vendors, or organizations). It is used for reporting purposes or for facilitating Letter Generation.

How does population selection work?

Selects the PIDM* for individuals who meet the selection criteria:

```
SELECT  pidm
  FROM  table
 WHERE  criteria
```

*Primary Identification Master

Population Selection involves four basic steps:

- Identify an application
- Define the Population Selection criteria
- Extract the IDs that match the criteria
- Review the Population Selection

Step 1: Identify an Application

Application

An application owns a grouping of Population Selections.
The rules established by the parent application will be inherited by the child objects.

- Examples: General, Recruiting, Alumni

Although the application must be defined in the Application Rules table (GLRAPPL), the rules (criteria) at this level are optional.

Step 2: Define Criteria

Example

Example: test_female

```
SELECT spbpers_pidm
  FROM spbpers, spriden
 WHERE spriden_pidm = spbpers_pidm
***AND spriden_change_ind IS NULL
   AND spraddr_stat_code = 'PA'
   AND spbpers_sex = 'F'
   AND spriden_entity_ind = 'P';
```

GLRSLCT

Population Selection Definition Rules table (GLRSLCT)

- Allows for entry of the specific criteria which distinguishes one population from another
- If the tables are joined by PIDM, the PIDM join is automatic
- If the tables are joined by additional columns, the conditions must be explicitly defined

When the form is exited, the process Parameter Selection Process (GLBPARM) compiles the SELECT statement.

Step 3: Extract the IDs

GLBDATA

Run the Population Selection Extract Process (GLBDATA) from Job Submission.

Population Selection Extract Process (GLBDATA) parameters:

Required?	Parameter	Description
✓	Selection Identifier 1	Enter in all capital letters.
	Selection Identifier 2	Used only for Union, Intersect, or Minus functionality
	New Selection Identifier	Used only for Union, Intersect, or Minus functionality
	Enter description of Selection	Used only for Union, Intersect, or Minus functionality
	Enter (U)nion, (I)ntersect, (M)inus	Used only for Union, Intersect, or Minus functionality
✓	Application	Enter in all capital letters.
✓	Creator ID	Enter in all capital letters.
	Detailed Execution Report	

Step 4: Review Population Selection

GLAEXTR	Population Selection Extract Data Form (GLAEXTR) • Review the results of running Population Selection Extract Process (GLBDATA) • Add other IDs not processed by GLBDATA • Remove IDs processed by GLBDATA

Population Selection Process Flow

Process flow

Application definition
- GLIAPPL - Application Inquiry Form
- GLRAPPL - Application Rules table

Objects
- GLIOBJC
- GLIOBJT

Variable usage

Variable definitions
- GLRVRBL - Variable Definition Rules table

Population Selection rules
- GLRSLCT - Population Selection Definition Rules table

Manual population creation
- GLAEXTR – Population Selection Extract Data Form

View population
- GLIEXTR - Population Selection Extract Data Inquiry Form

Self Check

Directions	Use the information you have learned in this workbook to complete this self check activity.
Exercise 1	Write a population selection to extract students who have an EFC between 100 and 200. Extract the students and then run a report (one that's in baseline Banner) to print to the database the extracted students' full names and IDs.

Self Check – Answer Key

Exercise 1

Write a population selection to extract students who have an EFC between 100 and 200. Extract the students and then run a report (one that's in baseline Banner) to print to the database the extracted students' full names and IDs.

The report to run is the Basic Applicant Report (RORAPLT).

Section G: Letter Generation

Overview

In this section These topics are covered in this section.

Topic	Page
Letter Generation Overview	G-2
Example Letter	G-3
Steps to Create a Letter	G-4
Step 1: Define Variables	G-5
Step 2: Construct Paragraphs	G-6
Step 3: Combine Paragraphs	G-7
Step 4: Extract a Population	G-9
Step 5: Extract Letter Variables	G-10
Step 6: Print the Letter	G-11
Creating a Letter	G-12
Tracking Letters	G-13

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Letter Generation Overview

Description

Letter Generation allows you to extract data from the SCT Banner database and merge that data with text, then print the results and log what letter was created and for whom the letter was created.

Letter Generation allows you to extract data from SCT Banner based on a given Population Selection, merge extracted data with text, print the results, and maintain a log of printed letters.

How does Letter Generation work?

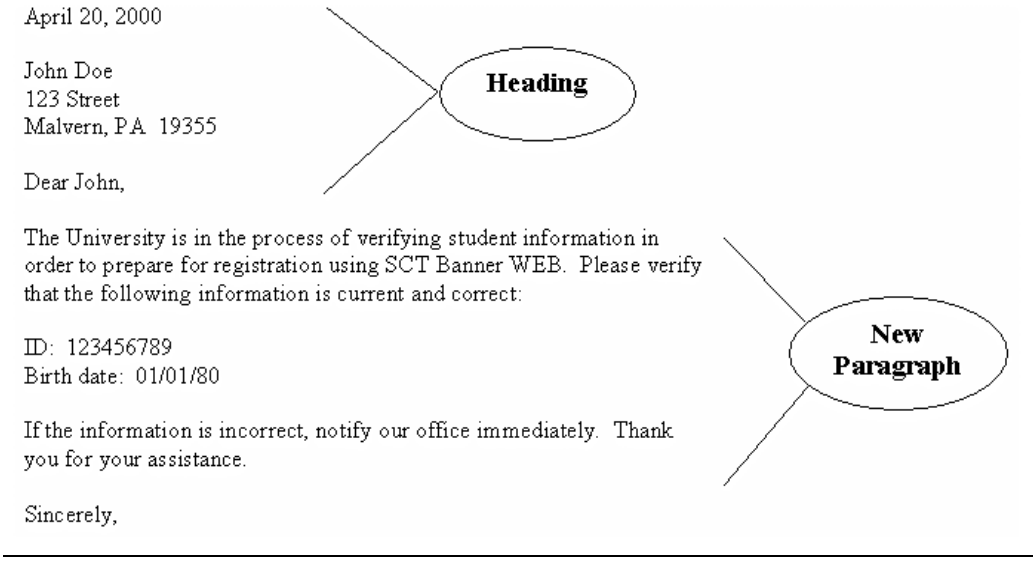
Letter Generation extracts specific data from the PIDMs which are extracted during a Population Selection.

```
SELECT spriden_first_name,
       spriden_last_name
  FROM  spriden
 WHERE  pop_sel criteria
```

Next, it merges the extracted data with paragraphs customized for your implementation.

Example Letter

Example


April 20, 2000
John Doe
123 Street
Malvern, PA 19355
Dear John,
The University is in the process of verifying student information in order to prepare for registration using SCT Banner WEB. Please verify that the following information is current and correct:
ID: 123456789
Birth date: 01/01/80
If the information is incorrect, notify our office immediately. Thank you for your assistance.
Sincerely,
Heading
New Paragraph

Steps to Create a Letter

Steps

- Define variables to be used
- Construct paragraphs
- Combine paragraphs into letters
- Extract population
- Extract letter variables
- Print letter or create merge file

Step 1: Define Variables

1st Paragraph

```
April 20, 2000          *DATE1

John Doe                *FUNC_PERSON_NAME
123 Street              *FUNC_PERSON_ADDRESS_LINE1 (LINE2, LINE3)
Malvern, PA  19355      *FUNC_PERSON_CITY_STATE_ZIP

Dear John,              *FUNC_PERSON_SALUTATION
```

GLRVRBL

Variable Rules Definition table (GLRVRBL)

- Builds selection criteria for data element
- Owned by an application
- Must have data associated with an ID

2nd paragraph

```
The University is in the process of verifying student
information in order to prepare for registration using SCT
Banner WEB.  Please verify that the following information is
current and correct:

ID: 123456789           *ID
Birth date: 01/01/80    *BIRTH_DATE

If the information is incorrect, notify our office immediately.
Thank you for your assistance.

Sincerely,
```

Compilation

When the form is exited, the Parameter Selection Process (GLBPARM) compiles the SELECT statement.

Step 2: Construct Paragraphs

GTVPARA	Paragraph Code Validation Form (GTVPARA) • Define codes and descriptions for paragraphs
GUAPARA	Letter Generation Paragraph Form (GUAPARA) • Define the contents of each paragraph • Paragraphs contain variables, formatting commands, and text • Paragraphs for merge files contain only variables

Step 3: Combine Paragraphs

GTVLETR

Letter Code Validation Form (GTVLETR)

- Define codes and descriptions for letters

GUALETR

Letter Process Form (GUALETR)

- Combine paragraphs into a letter

Example letter – 1st paragraph

```
*DATE1
#nl
*FUNC_PERSON_NAME
#nl
*FUNC_PERSON_ADDRESS_LINE1 (LINE2, LINE3)
#nl
*FUNC_PERSON_CITY_STATE_ZIP
#nl
#nl
Dear
*FUNC_PERSON_SALUTATION
```

Example letter – 2nd paragraph

```
#nl
The University is in the process of verifying student
information in
#nl
order to prepare for registration using SCT Banner WEB.  Please
#nl
verify that the following information is current and correct:
#nl
#nl
ID:
#nl
*ID
#nl
Birth date:
#nl
*BIRTH_DATE
#nl
If the information is incorrect, notify our office immediately.
#nl
Thank you for your assistance.
#nl
#nl
Sincerely,
```

Continued on the next page

Step 3: Combine Paragraphs, Continued

Example letter – merge file

```
*DATE1
*FUNC_PERSON_NAME
*FUNC_PERSON_ADDRESS_LINE1 (LINE2, LINE3)
*FUNC_PERSON_CITY_STATE_ZIP
*FUNC_PERSON_SALUTATION
*ID
*BIRTH_DATE
```

Step 4: Extract a Population

Extraction requirement	A population must have been extracted prior to the next few steps in Letter Generation.

Step 5: Extract Letter Variables

GLBLSEL

Run the Letter Extract Process (GLBLSEL) from Job Submission.

This process extracts data from the database for selected PIDMs and stores it in a collector table.

Step 6: Print the Letter

GLRLETR

Submit the Letter Generation Print Report (GLRLETR) through the Process Submission Controls Form (GJAPCTL).

- Removes the selected variables from the Collector table
- Merges that data with text specified in a letter
- Prints the letter or creates the appropriate word processing file

Creating a Letter

Required forms

Application Definition Rules Form (GLRAPPL)
- Create an application (only once)

Object Definition Rules Form (GLROBJT)
- Created once per object

Letter Code Validation Form (GTVLETR)
- Needed for every letter

Variable Definition Rules Form (GLRVRBL)
- Every variable has to be created (only once) *

Paragraph Code Validation Form (GTVPARA)
- Needed for every paragraph *

Letter Generation Paragraph Form (GUAPARA)
- Details needed for each paragraph

*Can be used for multiple letters in the same module

Tracking Letters

PL/SQL scripts

There are three PL/SQL scripts to select those needing letters:

- RESTRK1.SQL
  Selects all students that have never had a user-specified tracking letter sent or have had that tracking letter sent more than a user-specified number of days ago.
- RESTRK2.SQL
  Selects only students that have never had a user-specified tracking letter sent.
- RESTRK3.SQL
  Selects only students that have had a user-specified tracking letter sent more than a user-specified number of days ago.

The user-specified values are defined at the beginning of each script.

Purpose

These scripts help you identify students who need to have an initial or a follow-up tracking letter sent. When executed, these SQL*PLUS scripts place student IDs into Population Selection IDs for use in Letter Generation. These scripts replace the usual procedure of defining rules for a Population Selection ID and then running the Population Selection Extract Process (GLBDATA). It is necessary to use these scripts because of current limitations in the Population Selection process.

Notes

RESTRK1.SQL can be used if you use the same letter for initial and follow-up tracking requests. If you use different letters, then you could use RESTRK2.SQL for initial requests and RESTRK3.SQL for follow-up requests.

Note: The Selection ID being populated must first have been created on GLRSLCT. Also, note that all students are deleted from the Selection ID at the beginning of each script prior to the new population being inserted.

[1] Banner2000 Financial Aid User Manual, release 4.0, page 3-38, September 1999.

Section H: Conversions

Overview

In this section These topics are covered in this section.

Topic	Page
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Conversion Considerations	H-3
Timing Considerations	H-4
Conversion Steps	H-5
Financial Aid System Conversions	H-6
General Person Records	H-7
General Student Records	H-8
Tracking Requirements	H-9
Award History and Transcripts	H-10
Conversion	H-11
Testing	H-12
Database Requirements	H-13
Cleaning Database	H-14
Migration to Production	H-15

Conversion Methods

Manual conversions	• Slower • Data entry errors • Small volume only
Electronic conversions	• Large volumes • Requires development and testing

Conversion Considerations

Considerations

- Keeping track of PIDM on Legacy System
- What type of data you are bringing across
- Random ID# or SSN?
- Name/Address formatting
  - No number signs: “#”
  - No periods: “.”
- Address types
- Multiple IDs on Legacy System?

Timing Considerations

New year conversion	• Recommended • Starts January 1
Mid-year conversion	• Not recommended • Each table must be populated to suggest SCT Banner Financial Aid was running since the beginning of the aid year

Conversion Steps

Steps

- 1. Document
- 2. Review current data
- 3. Determine scope (What will you convert?)
- 4. Map current data to SCT Banner
- 5. Write a detail data plan
- 6. Review plan and get approval
- 7. Develop procedures and programs
- 8. Test
- 9. Create database
- 10. Perform conversion
- 11. Verify and correct
- 12. Test

*****You will need your end users!

Financial Aid System Conversions

Conversions

- Persons
- Students
- Award history and transcripts
- Tracking requirements

Refer to Chapters 5, 6, and 8 of the Financial Aid Technical Reference Manual

General Person Records

Records

- Identification table (SPRIDEN) - Person ID (required)
- Address table (SPRADDR)
- Telephone Number table (SPRTELE)
- Person table (SPBPERS) - Basic person
- Applicant Holds table (SPRHOLD) - Holds

General Student Records

SGBSTDN	Student Base table (SGBSTDN) - (Required) • Residency • Academic status • Educational goal
Other student data	• Assistantship / Fellowship / Internship • Educational opportunity • Student disability • Veteran status • Sports information

Tracking Requirements

ROBINST	Financial Aid Institution table (ROBINST) • Create one record for each aid year that you load • Enter data manually through the Financial Aid Institution Options Form (ROAINST)
RTVTRST	Tracking Requirements Status Validation table (RTVTRST) • All tracking requirement status codes must exist before you can load historic records
STVSBGI	Source/Background Institution Code Validation Form (STVSBGI) • Source background institution codes must exist before you can load historic records with SBGI codes
RTVTREQ	Tracking Requirements Validation table (RTVTREQ) • All tracking requirements codes must exist before you can load historic records
RTVTGRP	Tracking Group Validation table (RTVTGRP) • All tracking group codes must exist before you can load historic records

Award History and Transcripts

Functional staff (tables)

- Financial Aid Institution table (ROBINST)
- Fund Base Data table (RFRBASE)
- Satisfactory Academic Progress Validation table (RTVSAPR)
- Award Status Validation table (RTVAWST)
  - Award Status codes must exist here
- Student Term Validation table (STVTERM)
  - Term codes must exist here before you can load historic records

Technical staff (tables)

- Fund Aid Year Specific Data table (RFRASPC)
  - Packaging and Disbursement uses aid year-specific fund codes
  - Only required for mid-year conversion
- Satisfactory Academic Progress Rules table (RORSAPR)
- Applicant Status Report (RORSTAT)
- Applicant Award table (RPRAWRD)
  - Create award records, one per aid year, per PIDM, per fund code

Conversion

Financial Aid Hold	• Applicant Status table (RORSTAT)
	• Financial Aid Holds table (RORHOLD)
	  • Financial Aid holds are linked to the student by PIDM by aid year by hold code
	• Hold Type Validation Form (RTVHOLD)
	  • Financial Aid hold codes must exist here before you can load historic records

Applicant Comments	• Applicant Status table (RORSTAT)
	• Financial Aid Institution table (ROBINST)
	  • Financial Aid Institution Options Form (ROAINST)
	• Applicants Comments (RHRCOMM)
	  • Applicant comments are created by PIDM by user ID
	  • Comments also require sequence number

Testing

Testing

- Use SCT Banner forms to view inserted data
- Navigate through several forms
- User testing

Database Requirements

Clean instance

A clean instance must have at least:

- RFRFFID - Federal Fund ID table
- RORDATA - Data Dictionary table
- RORDSUP - Supplemental Log Data table
- RORDVAL - Audit Log Form Data Code table
- RORPELL - PELL Grant Payment Schedule table
- RPRFEDR - Federal Rules table
- RTVINFC - Application Tape ID Validation table
  - (Code, Desc and Activity Date, only)
  - All other columns should be null
- RTVRJCT - Reject Validation table
- RTVPTYP - Batch Posting Type Validation table
- RTVDLBT - Batch Type Validation table
- RTVPRCD - Program Code Validation table
- RTVYICD - Year in College Description table

RORDATA & RORDSUP are delivered by SCT and should never be changed. They map the BANNER fields to the fields the central processor recognized for Need Analysis.

Cleaning Database

Cleaning database	Review cln_finaid_7x.sql

Migration to Production

Migration to production	• Review the Migration to Production table in Section K, Table Indexes. • Non-supported data, client needs to review their database and SCT Banner installation

Section I: Troubleshooting

Overview

In this section These topics are covered in this section.

Topic	Page
Building Online Group Assignment Rules Using Outer Joins	I-2
Tips for Financial Aid Rules on Forms	I-4
Hints on Improving Performance of Rules Created on RORRULE	I-5

Building Online Group Assignment Rules Using Outer Joins

Incorrect rule

The following budgeting assignment rule would not function as intended if you were attempting to select a person into a particular budget group with the following characteristics:

- The person has a BANNER housing code that indicates the person is a dormitory resident, and
- The person is identified as an undergraduate in either the general student record or admission record

```
(RCRAPP1_CURR_REC_IND = 'Y' AND
RCRAPP1_INST_HOUS_CDE = '2' AND
(ROVST95_LEVL_CODE = 'UG' OR
ROVAD95_LEVL_CODE = 'UG'))
```

Explanation

The SCT views to the Student System, the Student View with Effective Date (ROVSTxx) and the Admissions Application View (ROVADxx), were specifically designed for use in Financial Aid rules forms. These views enable you to access data in the Student system without the need to specify term code joins.

The difficulty with the preceding rule is that when you commit and exit from the Financial Aid Selection Rules Form (RORRULE), the Automatic Rule Compilation (ROOGSQL) COBOL process adds the necessary PIDM and aid year joins for you behind the scenes. Therefore, the preceding rule becomes:

```
SELECT DISTINCT(RCRAPP1_PIDM)
FROM FAISMGR.RCRAPP1, FAISMGR.ROVST95,
     FAISMGR.ROVAD95
 WHERE (RCRAPP1_CURR_REC_IND = 'Y'
   AND RCRAPP1_INST_HOUS_CDE = '2'
   AND (ROVST95_LEVL_CODE = 'UG'
    OR ROVAD95_LEVL_CODE = 'UG'))
   AND ROVST95_PIDM =RCRAPP1_PIDM
   AND ROVAD95_PIDM =RCRAPP1_PIDM
   AND ROVST95_AIDY_CODE = RCRAPP1_AIDY_CODE
   AND ROVAD95_AIDY_CODE = RCRAPP1_AIDY_CODE
   AND RCRAPP1_AIDY_CODE = :AIDY
   AND RCRAPP1_PIDM =:PIDM
```

The additional PIDM and aid year joins require that a record exist in each view, not just one or the other, for this statement to be successful. Students must have records in both views to be selected; this was not the intention of the rule.

Continued on the next page

Building Online Group Assignment Rules Using Outer Joins, Continued

Outer join

This statement, however, can be easily modified and made to work using an outer join.

(An outer join enables you to make one table or view optional. If a row exists in that table or view, you use it; if it does not exist, the statement does not fail and continues without it. The "join" column of the optional table or view has the symbol "(+)" added to it to identify it as an outer join.)

In this case, add one more row to the preceding statement:

```
(RCRAPP1_CURR_REC_IND = 'Y' AND
RCRAPP1_INST_HOUS_CDE = '2' AND
(ROVST95_LEVL_CODE = 'UG' OR
ROVAD95_LEVL_CODE = 'UG')) AND     <--Added AND
ROVST95_PIDM (+) = RCRAPP1_PIDM    <--Additional row
```

Revised statement

The "compiled" statement becomes the following:

```
SELECT DISTINCT(RCRAPP1_PIDM)
  FROM FAISMGR.RCRAPP1, FAISMGR.ROVST95,
       FAISMGR.ROVAD95
 WHERE (RCRAPP1_CURR_REC_IND = 'Y'
   AND RCRAPP1_INST_HOUS_CDE = '2'
   AND (ROVST95_LEVL_CODE = 'UG'
    OR ROVAD95_LEVL_CODE = 'UG'))
   AND ROVST95_PIDM(+) = RCRAPP1_PIDM
   AND ROVST95_PIDM(+) =RCRAPP1_PIDM
   AND ROVAD95_PIDM =RCRAPP1_PIDM
   AND ROVST95_AIDY_CODE (+) = RCRAPP1_AIDY_CODE
   AND ROVAD95_AIDY_CODE = RCRAPP1_AIDY_CODE
   AND RCRAPP1_AIDY_CODE = :AIDY
   AND RCRAPP1_PIDM =:PIDM
```

Note that wherever ROVST95 is joined to another table or view, the outer join symbol (+) has been included by the ROOGSQL process. This rule now requires that a record exist in ROVAD95, with or without a level code, and makes the ROVST95 record optional.

In other words, if both a general student record and an admissions record exist for this student, check if either has the level code set to "UG". If a general student record does not exist yet for this student, use the student's level on the admissions record and ignore the general student record references. If there is no admissions record, however, the statement fails and the student is either processed into another group or is assigned to the default group.

Tips for Financial Aid Rules on Forms

Tips

- If you reference any of the RCRAPPx tables in the rules that you write for Financial Aid forms, you do not need to include `RCRAPP1_CURR_REC_IND = 'Y'` on the form; it is automatically generated into the compiled rule by the ROOGSQL process when you commit and exit the form.
- You can only add an outer join to one table or view on the form.
- Use outer joins only on table/view to table/view joins. Therefore, only include the outer join symbol (+) on a single rule line that joins the key column of one table/view to the key column of another. This is considered a PIDM join when grouping rules. You should not use it on every line which accesses the outer joined tables.
- When you use outer joins on the Financial Aid rules forms, you must create the join line with the optional table/view on the left (for example, `ROVST95_PIDM (+) = RCRAPP1_PIDM`).

Hints on Improving Performance of Rules Created on RORRULE

Rule	**RULE:** If you are using RCRAPP2, RCRAPP3, RCRAPP4 or RCRESAR in your RORRULE rules, include the rule RCRAPP1_CURR_REC_IND='Y' as a rule on the form. To make it easier to see, we have placed it as the LAST rule on the form. Including this rule will ensure that the correct RCRAPP1 index/constraint is used for performance purposes. If RCRAPP1 is the only RCRAPPx table that is used in your rule, you do not need to include it onthe form. The reason for the performance difference is the order in which ROOGSQL creates the "compiled rules" and, as a result, the RCRAPP1 index which is used at run time.
Indexes	RCRAPP1 has 2 indexes, RCRAPP1_CURR_INDEX - a nonunique index, and PK_RCRAPP1 - a unique, primary key constraint. The preferred index/constraint when using multiple RCRAPPx tables is PK_RCRAPP1.
RCRAPP1_ CURR_INDEX	RCRAPP1_CURR_INDEX (nonunique) is made up of: 1 RCRAPP1_AIDY_CIDE 2 RCRAPP1_PIDM 3 RCRAPP1_CURR_REC_IND
PK_RCRAPP1	PK_RCRAPP1 (primary key constraint) is made up of: 1 RCRAPP1_AIDY_CODE 2 RCRAPP1_PIDM 3 RCRAPP1_INFC_CODE 4 RCRAPP1_SEQ_NO

Continued on the next page

Hints on Improving Performance of Rules Created on RORRULE, Continued

Rule created on RORRULE

When the rule is created on RORRULE as:

```
RCRAPP1_VERIFICATION_MSG = '1' AND
RCRAPP2_MODEL_CDE = 'D' AND
ROVST95_STYP_CODE = '9' AND
ROVST95_STST_CODE IN ('AS','SA') AND
ROVST95_LEVL_CODE = 'UG'
```

Compile order

The rule is "compiled" by ROOGSQL in the following order:

```
SELECT DISTINCT(RCRAPP1_PIDM)
  FROM RCRAPP1,RCRAPP2,ROVST96
 WHERE RCRAPP1_VERIFICATION_MSG = '1'
   AND RCRAPP2_MODEL_CDE = 'D'
   AND ROVST96_STYP_CODE = '9'
   AND ROVST96_STST_CODE IN ('AS','SA')
   AND ROVST96_LEVL_CODE = 'UG'
   AND RCRAPP2_PIDM =RCRAPP1_PIDM
   AND ROVST96_PIDM =RCRAPP1_PIDM
   AND RCRAPP2_INFC_CODE = RCRAPP1_INFC_CODE
   AND RCRAPP2_SEQ_NO = RCRAPP1_SEQ_NO
   AND RCRAPP1_CURR_REC_IND = 'Y'
   AND RCRAPP2_AIDY_CODE = RCRAPP1_AIDY_CODE
   AND ROVST96_AIDY_CODE = RCRAPP1_AIDY_CODE
   AND RCRAPP1_AIDY_CODE = :AIDY
   AND RCRAPP1_PIDM =:PIDM
```

Continued on the next page

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Hints on Improving Performance of Rules Created on RORRULE, Continued

RCRAPP1_ CURR_REC_ IND added

When RCRAPP1_CURR_REC_IND is added to the rule on RORRULE as follows:

```
RCRAPP1_VERIFICATION_MSG = '1' AND
RCRAPP2_MODEL_CDE = 'D' AND
ROVST95_STYP_CODE = '9' AND
ROVST95_STST_CODE IN ('AS','SA') AND
ROVST95_LEVL_CODE = 'UG'
RCRAPP1_CURR_REC_IND = 'Y' <====== HERE
```

Compile order

The "compiled" rule is created in this order:

```
SELECT DISTINCT(RCRAPP1_PIDM)
  FROM FAISMGR.RCRAPP1, FAISMGR.RCRAPP2,
       FAISMGR.ROVST96
 WHERE RCRAPP1_VERIFICATION_MSG = '1'
   AND RCRAPP2_MODEL_CDE = 'D'
   AND ROVST96_STYP_CODE = '9'
   AND ROVST96_STST_CODE IN ('AS','SA')
   AND ROVST96_LEVL_CODE = 'UG'
   AND RCRAPP1_CURR_REC_IND = 'Y'
   AND RCRAPP2_PIDM =RCRAPP1_PIDM
   AND ROVST96_PIDM =RCRAPP1_PIDM
   AND RCRAPP2_INFC_CODE = RCRAPP1_INFC_CODE
   AND RCRAPP2_SEQ_NO = RCRAPP1_SEQ_NO
   AND RCRAPP2_AIDY_CODE = RCRAPP1_AIDY_CODE
   AND ROVST96_AIDY_CODE = RCRAPP1_AIDY_CODE
   AND RCRAPP1_AIDY_CODE = :AIDY
   AND RCRAPP1_PIDM =:PIDM
```

Notes

Since SQL processes from the bottom up, the rule WITHOUT the manual RCRAPP1_CURR_REC_IND='Y' rule finds the RCRAPP1 columns in the order shown in column 1 and uses the nonunique RCRAPP1_CURR_INDEX.

The column order of the rule WITH the manually added RCRAPP1_CURR_REC_IND is shown in column 2. Based on its order, it uses PK_RCRAPP1:

WITHOUT	WITH
1. RCRAPP1_PIDM	1. RCRAPP1_PIDM
2. RCRAPP1_AIDY_CODE	2. RCRAPP1_AIDY_CODE
3. RCRAPP1_CURR_REC_IND	3. RCRAPP1_SEQ_NO
4. RCRAPP1_SEQ_NO	4. RCRAPP1_INFC_CODE
5. RCRAPP1_INFC_CODE	5. RCRAPP1_CURR_REC_IND
(1-3: RCRAPP1_CURR_INDEX)	(1-4: PK_RCRAPP1)

Continued on the next page

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Hints on Improving Performance of Rules Created on RORRULE, Continued

Rule

RULE: If your rule will require PIDM and AIDY_CODE joins between RCRAPP1 and another RCRAPPx table, use an RCRAPPx column as the first column in your rule. This is necessary because the ROOGSQL compile program uses the first rule line's table as the driving table for additional joins.

RCRAPPx

When the rule is created on the form as:

```
RCRAPP2_MODEL_CDE = 'D' AND  <====    First rule line is
                                      RCRAPPx column
RCRAPP1_VERIFICATION_MSG = '1' AND
RCRAPP1_CURR_REC_IND = 'Y' AND
ROVST95_LEVL_CODE = 'UG' AND
ROVST95_STYP_CODE = '9' AND
ROVST95_STST_CODE IN ('AS','SA)
```

Compiled rule

The "compiled" rule INCLUDES an RCRAPP1 to RCRAPP2 PIDM join:

```
SELECT DISTINCT(RCRAPP2_PIDM)
  FROM RCRAPP2,RCRAPP1,ROVST96
 WHERE RCRAPP2_MODEL_CDE = 'D'
   AND RCRAPP1_VERIFICATION_MSG = '1'
   AND RCRAPP1_CURR_REC_IND = 'Y'
   AND ROVST96_LEVL_CODE = 'UG'
   AND ROVST96_STYP_CODE = '9' = 'UG'
   AND ROVST96_STST_CODE IN ('AS','SA')
   AND RCRAPP1_PIDM =RCRAPP2_PIDM    <== RCRAPPx
   AND ROVST96_PIDM =RCRAPP2_PIDM        PIDM join
AND RCRAPP2_INFC_CODE = RCRAPP1_INFC_CODE
AND RCRAPP2_SEQ_NO = RCRAPP1_SEQ_NO
AND RCRAPP1_AIDY_CODE = RCRAPP2_AIDY_CODE
AND ROVST96_AIDY_CODE = RCRAPP2_AIDY_CODE
AND RCRAPP2_AIDY_CODE = :AIDY
AND RCRAPP2_PIDM =:PIDM
```

Continued on the next page

Hints on Improving Performance of Rules Created on RORRULE, Continued

Non-RCRAPPx

However, when it is created in this order:

```
ROVST95_STYP_CODE = '9' AND <== First rule line is
                                Non-RCRAPPx column
ROVST95_STST_CODE IN ('AS','SA') AND
ROVST95_LEVL_CODE = 'UG' AND
RCRAPP2_MODEL_CDE = 'D' AND
RCRAPP1_VERIFICATION_MSG = '1' AND
RCRAPP1 CURR_REC_IND = 'Y'
```

Compiled code

The resulting "compiled" code DOES NOT INCLUDE either the RCRAPP1 to RCRAPP2 PIDM join or the RCRAPP1 to RCRAPP2 AIDY_CODE join:

```
SELECT DISTINCT(ROVST96_PIDM)
  FROM ROVST96,RCRAPP2,RCRAPP1
 WHERE ROVST96_STYP_CODE = '9'
   AND ROVST96_STST_CODE IN ('AS','SA')
   AND ROVST96_LEVL_CODE = 'UG'
   AND RCRAPP2_MODEL_CDE = 'D'
   AND RCRAPP1_VERIFICATION_MSG = '1'
   AND RCRAPP1_CURR_REC_IND = 'Y'
   AND RCRAPP2_PIDM =ROVST96_PIDM
   AND RCRAPP1_PIDM =ROVST96_PIDM
   AND RCRAPP2_INFC_CODE = RCRAPP1_INFC_CODE
   AND RCRAPP2_SEQ_NO = RCRAPP1_SEQ_NO
   AND RCRAPP2_AIDY_CODE = ROVST96_AIDY_CODE
   AND RCRAPP1_AIDY_CODE = ROVST96_AIDY_CODE
   AND ROVST96_AIDY_CODE = :AIDY
   AND ROVST96_PIDM =:PIDM
```

Section J: SCT Banner Help Resources

Overview

In this section These topics are covered in this section.

Topic	Page
SCT Banner Discussion Lists	J-2
SunGard SCT's ActionWeb	J-3
SunGard SCT's ActionMail	J-4
SunGard SCT's ActionLine	J-5

SCT Banner Discussion Lists

Discussion lists

SunGard SCT supports a number of useful discussion lists:

- boracle - Oracle issues
- bfinaid - Financial Aid product issues
- bgeneral - General product issues
- breport - Reporting issues
- btrain - Training issues
- bpost - Electronic distribution announcements

List of lists

For a listing of SunGard SCT's discussion lists, send an email message to:

```
listserv@sungardsct.com
```

- No subject
- Message body: LISTS

For additional discussion lists, try:

```
listproc@sungardsct.com
```

Subscribing

Send mail to `listserv@sungardsct.com` (or `listproc`)

- Leave subject field blank
- In message body:

```
subscribe listname YourFirstName YourLastName
```

You may subscribe to multiple lists in the same email, as long as each subscribe command is on a separate line.

Example:

```
subscribe boracle John Doe
subscribe bfinaid John Doe
```

SunGard SCT's ActionWeb

ActionWeb

Available from SunGard SCT's web site, `www.sungardsct.com` (click on “Support”)

ActionWeb allows clients to:

- Contact the ActionLine
- Check status of their contacts with ActionLine
- Browse Known Issues
- Review FAQ's
- Access Electronic Distribution (download)
- Access additional services

Requesting access

To request access to SunGard SCT's secured ActionWeb pages, send email requests to:

`csr@sungardsct.com`

Include your name, phone #, and organization name.

SunGard SCT's ActionMail

ActionMail	ActionMail allows clients to send their ActionLine questions through email. ActionMail requests/questions are given the same priority as those made over the phone. Use this service for less time-critical issues.
Contacting ActionMail	Send the following information to ambanfa@sungardsct.com: • Your name and organization • Your product and release number • Severity of problem (high, medium, low) • Your e-mail address and phone number • Your question (detailed description)

SunGard SCT's ActionLine

Description

Phone/Fax help for time-critical issues.

To contact ActionLine:

```
Phone: 1-800-522-4TCP
FAX: 1-610-725-7430
```

Section K: Table Indexes

Overview

In this section These topics are covered in this section.

Topic	Page
Financial Aid Rule and Validation Tables for Migration from PPRD to PROD (January 5, 2005)	K-2
Applicant Status Table (Base Financial Aid Table - RORSTAT)	K-7

Financial Aid Rule and Validation Tables for Migration from PPRD to PROD (January 5, 2005)

Table Name	Import Order	Rule/ Validation Table?	Area	Description	Comments
RTVAPRD	Group 1	X	F	Aid Period Validation Table	
RTVBGRP	Group 1	X	B	Budget Group Validation Table	
RTVPGRP	Group 1	X	A	Packaging Group Validation Table	
RTVSAPR	Group 1	X	SAP	Satisfactory Academic Progress Validation Table	
RTVTGRP	Group 1	X	TRACK	Tracking Group Validation Table	
RTVTREQ	Group 1	X	TRACK	Tracking Requirements Validation Table	
RTVTRST	Group 1	X	TRACK	Tracking Requirements Status Validation Table	
RTVINFC	Group 2	X	EDE	Application Tape ID Validation Table	"Code, Desc. & Activity Date"
ROBINST	Group 3	X	OVER	Financial Aid Institution Table	
RORCAMP	Group 3	X	OVER	Financial Aid Campus Table	
RORCRHR	Group 3	X	OVER	Credit Hours Table	
RORCLVE	Group 3	X	OVER	Course/Student Level Exclusion Table	
RORWEBA	Group 3	X	OVER	Web Acceptance Table	
RTVARSC	Group 4	X	OR	Financial Aid Resource Codes	
RTVAUST	Group 4	X	SE	Employment Authorization Status Validation Table	
RTVAWST	Group 4	X	A	Award Status Validation Table	
RTVBTYP	Group 4	X	B	Budget Type Validation Table	
RTVCINT	Group 4	X	L	Certification Initials Validation Table	
RTVCOMP	Group 4	X	B	Budget Component Validation Table	
RTVFSRC	Group 4	X	F	Fund Source Validation Table	
RTVFTYP	Group 4	X	F	Fund Type Validation Table	
RTVHOLD	Group 4	X	HOLDS	Financial Aid Hold Type Validation Table	
RTVICMT	Group 4	X	OVER	ISIR Comment Code Text Validation Table	Delivered
RTVLNST	Group 4	X	L	Loan Status Validation Table	
RTVMESG	Group 4	X	MESG	Message Validation Table	
RTVRFST	Group 4	X	SE	Referral Status Validation Table	
RTVUSER	Group 4	X	USER	User-Defined Variable Description Table	

Continued on the next page

Financial Aid Rule and Validation Tables for Migration from PPRD to PROD (January 5, 2005), Continued

Table Name	Import Order	Rule/ Validation Table?	Area	Description	Comments
RORDATA	1	X	OVER	Data Dictionary Table	Delivered
RPRFEDR	3	X	OVER	Federal Rules Table	Delivered
RFRMESG	4	X	F	Fund / Message Assignment Rules Table	
RBRGMSG	5	X	B	Budget Group Message Rules Table	
RRRTMSG	6	X	TRACK	Tracking Requirement Message Rules Table	
RFRBCMP	7	X	F	Fund / Budget Component Table	
RFRTREQ	8	X	F	Fund / Requirements Assignment Rules Table	
RFRBASE	9	X	F	Fund Base Data Table	
RCRAIDY	10	X	OVER	Telephone Financial Aid Award Year Table defines the award years that are available for telephone.	
RCRTERM	11	X	OVER	Telephone Financial Aid Term Table defines the terms that are available for telephone.	
RPRCLSS	12	X	OVER	Class Code Translation Table	
RPRCLVL	13	X	OVER	Campus Undergraduate Level Code Rules Table	
RPRDATE	14	X	OVER	Enrollment Options by Term Table	
RORINID	15	X	OVER	Financial Aid College Codes Table	
RBRGTYP	16	X	B	Budget Group/Budget Type Rules Table	
RBRCOMP	17	X	B	Budget Component Rules Table	
RRRGREQ	18	X	TRACK	Tracking Group/Requirements Rules Table	
RJBJOBT	19	X	SE	Job Title Table	
RJBPLBD	20	X	SE	Placement Base Data Table	
RJBSEDR	21	X	SE	Student Employment Default Rules Table	
RJRPAYL	22	X	SE	Payroll Load Rules Table	
RJRPLRL	23	X	SE	Placement Rules Table	
RORGDAT	24	X	RULES	Group Selection Rules Base Table	
RORGSQL	25	X	RULES	Generated SQL Selection Identifier Table	
RORCMPL	26	X	RULES	Selection Identifier Compiled Statements	

Continued on the next page

Financial Aid Rule and Validation Tables for Migration from PPRD to PROD (January 5, 2005), Continued

Table Name	Import Order	Rule/ Validation Table?	Area	Description	Comments
RCRINFR	27	X	EDE	Tape Matching Rules Table	not used in 7.X
RCRTPTR	28	X	EDE	Financial Aid Tape Translation Table	
RCRNAME		X	EDE	First Name Translation Rule Table	not used in 7.X
RPBLNDR	29	X	L	Lender Base Data Table	
RPBLNDA	30	X	L	Lenders and Disbursing Agents Base Table	
RPBLPRD	31	X	L	Loan Period Base Data Table	
RPBLOPT	32	X	L	Loan Options Table	Use for DL and FFELP
RORTPRD	33	X	F	Aid Period/Term Code Table	
RFRDEFA	34	X	F	Default Fund Award Schedule Rules Table	
RFRDEFD	35	X	F	Default Fund Disbursement Schedule Rules Table	
RFRDSCH	36	X	F	Fund Disbursement Schedule Rules Table	
RFRDLCK	37	X	F	Fund Disbursement Lock Table	
RFRASCH	38	X	F	Fund Award Schedule Rules Table	
RFRCOMM	39	X	F	Fund Comments	
RPRLDSB	42	X	L	Loan Period / Disbursement Schedule Rules Table	
RFRASPC	43	X	F	Fund Aid Year Specific Data	
RPRLPAP	44	X	L	Loan Period / Aid Period Rules Table	
RPBOPTS	45	X	OVER	Packaging Options Table	
RFRDETC	46	X	F	Fund / Detail Code Rules Table	
RPRLTRM	48	X	L	Loan Period / Term Schedule Rules Table	
RPRFSRC	49	X	A	Maximum Amount Per Fund Source	
RPRDEFE	50	X	A	Default Equity Packaging Rules Table	
RPRDEFG	51	X	A	Default Gap Packaging Rules Table	
RPRGEQY	52	X	A	Packaging Group Equity Packaging Rules Table	
RPRGSHP	53	X	A	Packaging Group Self-Help Packaging Rules Table	
RPRGGAP	54	X	A	Packaging Group Gap Packaging Rules Table	

Continued on the next page

Financial Aid Rule and Validation Tables for Migration from PPRD to PROD (January 5, 2005), Continued

Table Name	Import Order	Rule/ Validation Table?	Area	Description	Comments
RPRDEFS	55	X	A	Default Self-Help Packaging Rules Table	
RPRGFND	56	X	A	Packaging Group/Fund Rules Table	
RPREXPT	57	X	A	Exemption Rules Table	
RPRCONT	58	X	A	Third Party Contract Rules Table	
RPRFUND	59	X	A	Packaging Fund Total Table	
RORAUDT	60		OVER	Audit Grading Mode Table	
RORSTRF	61	X	SAP	SAP Translation Rules Table	
RHBTRNS	62	X	H&T	Prior Institution Transcript Base Table	Covered with NSLDS
RHRFUND	63	X	H&T	Transcript Rules Table	Covered with NSLDS
RFRFFID		X	OVER	Federal Fund Id Table	Delivered
RORCOLS		X	OVER	All Financial Aid columns Table	Delivered
RORDSUP		X	OVER	Supplemental Log Data	Delivered
RORDVAL		X	OVER	Audit Log Form/Data Code Table	Delivered
ROSSLCT		X	RULES	Rules Sequence Generator	Remember to re-set
RTVDLBT		X	L	"Batch Type Validation Table defines the batch types that are available in Direct Lending, one type for each kind of record sent to or received by the servicer."	Delivered
RTVPHAS		X	L	CommonLine Loan Application Phase Validation Table	Delivered
RTVPRCD		X	OVER	Program Code validation table for NSLDS	Delivered
RTVPTYP		X	OVER	Batch Posting Type Validation Table	Delivered
RTVRJCT		X	OVER	Reject Validation Table	Delivered
RTVRPSR		X	OTHER	Repayment Source Validation Table	Delivered
RTVCDST		X	OVER	COD State Code Validation Table	Delivered
RTVCDNT		X	OVER	COD Nation Code Validation Table	Delivered
RTVYICD		X	OVER	Year in College Description Table	Delivered
RORSECT		X		Exclude by Section Table	
RORPOST		X	OTHER	Batch Posting Rule Table	Cannot be moved until pop sels are moved
RPBSTAB		X		Short Term Table	

Continued on the next page

Financial Aid Rule and Validation Tables for Migration from PPRD to PROD (January 5, 2005), Continued

Parameter Sets Population Selections, Letter Generation and Job Submission Parameter Sets

Population Selections

Table Name	Import Order	Rule/ Validation Table?	Area	Description	Comments
GLBSLCT		X	PS		Application Code is FINAID
GLRSFRM		X	PS		
GLRSLCT		X	PS		

Variables

Table Name	Import Order	Rule/ Validation Table?	Area	Description	Comments
GLBVRBL		X	VAR		Application Code is FINAID
GLBVFRM		X	VAR		
GLRVRBL		X	VAR		

Letters

Table Name	Import Order	Rule/ Validation Table?	Area	Description	Comments
GTVLETR		X	LTR		All that begin with FA_ and SAP_
GTVPARA		X	LTR		
GUBPARA		X	LTR		
GUBLETR		X	LTR		

Job Submission parameter sets

Table Name	Import Order	Rule/ Validation Table?	Area	Description	Comments
GJBPDFT		X	JS		FAUSER ID
GJRJPRM		X	JS		

Applicant Status Table (Base Financial Aid Table - RORSTAT)

Condition Records must exist in this table for each aid year the student has data before any other data is converted

Column	Required?	Data Type	Length	Validation	Comment
RORSTAT_ACTIVITY_DATE	NOT NULL	DATE	(7)		The date that information for this record in the table was entered or last updated.
RORSTAT_AIDY_CODE	NOT NULL	VARCHAR2	(4)	ROBINST	The aid year to be associated with information in this record. Ex. 9091, 9192, 9293, etc.
RORSTAT_AUTH_DISB_AID_IND	NOT NULL	VARCHAR2	(1)		
RORSTAT_BGRP_PROC_IND	NOT NULL	VARCHAR2	(1)		
RORSTAT_LOCK_IND	NOT NULL	VARCHAR2	(1)		This field indicates whether the student's Financial Aid application record is locked.
RORSTAT_PCKG_FUND_PROC_IND	NOT NULL	VARCHAR2	(1)		
RORSTAT_PCKG_PROC_IND	NOT NULL	VARCHAR2	(1)		
RORSTAT_PCKG_STATUS_IND	NOT NULL	VARCHAR2	(1)		
RORSTAT_PGRP_LOCK_IND	NOT NULL	VARCHAR2	(1)		This field indicates whether a lock exists on the student's award package.
RORSTAT_PGRP_PROC_IND	NOT NULL	VARCHAR2	(1)		
RORSTAT_PIDM	NOT NULL	NUMBER	(8,0)	Match to SPRIDEN	The internal system student identification number.
RORSTAT_TGRP_PROC_IND	NOT NULL	VARCHAR2	(1)		
RORSTAT_USER_ID	NOT NULL	VARCHAR2	(30)		The logon ID of the user who entered or last updated the record in this table.
RORSTAT_VER_COMPLETE	NOT NULL	VARCHAR2	(1)	N' for all history years	This field specifies whether the verification has been completed.
RORSTAT_ADDL_STFD_ELIG_IND		VARCHAR2	(1)		Indicates if an applicant is eligible for additional Stafford awards.
RORSTAT_ALL_REQ_COMP_DATE		DATE	(7)		The date on which all tracking requirements for this applicant were satisfied.
RORSTAT_APPL_RCVD_DATE		DATE	(7)		The date on which the applicant's Financial Aid application was received, process or created, depending on the institutional option.
RORSTAT_APRD_CODE		VARCHAR2	(6)	RTVAPRD	The Aid Period to which the applicant is currently assigned.
RORSTAT_AUTH_DISB_AID_DATE		DATE	(7)		

Continued on the next page

Applicant Status Table (Base Financial Aid Table - RORSTAT), Continued

Column	Required?	Data Type	Length	Validation	Comment
RORSTAT_AUTH_DISB_AID_TERM		VARCHAR2	(6)		
RORSTAT_AWD_LTR_IND		VARCHAR2	(1)		This field indicates that an award letter should be generated for this student the next time letters are printed.
RORSTAT_BGRP_CODE		VARCHAR2	(6)	RTVBGRP	The student's assigned budget group.
RORSTAT_BORROWER_BASED_CDE		VARCHAR2	(1)		This field indicates whether the student's loans need to be processed using a borrower-based academic year rather than the standard award year. This code is free form without validation.
RORSTAT_CM_PC_LOCK_IND		VARCHAR2	(1)		This field indicates if a lock exists on the congressional methodology parental contribution.
RORSTAT_CM_SC_LOCK_IND		VARCHAR2	(1)		This field indicates if a lock exists on the congressional methodology student contribution.
RORSTAT_CM_TFC_LOCK_IND		VARCHAR2	(1)		This field indicates if a lock exists on the congressional methodology total family contribution.
RORSTAT_DISB_DATE		DATE	(7)		
RORSTAT_DISB_REQ_COMP_DATE		DATE	(7)		The date that all disbursement requirements were met for the particular applicant.
RORSTAT_FM_BATCH_LOCK		VARCHAR2	(1)		Indicates whether the FM data is locked from any updating by the batch tape load process.
RORSTAT_FORMER_HEAL_IND		VARCHAR2	(1)		If this indicator is set to Y, this student qualifies for additional Stafford Unsub loans in replacement of the HEAL Loan program.

Continued on the next page

Applicant Status Table (Base Financial Aid Table - RORSTAT), Continued

Column	Required?	Data Type	Length	Validation	Comment
RORSTAT_GRS_NEED		NUMBER	(11,2)		This field represents the gross need of the applicant defined as budget minus TFC, minus resources.
RORSTAT_IM_BATCH_LOCK		VARCHAR2	(1)		Indicates whether the IM data is locked from any updating by the batch tape load process.
RORSTAT_IM_GRS_NEED		NUMBER	(11,2)		Gross need based on institutional methodology.
RORSTAT_IM_LOCK		VARCHAR2	(1)		Indicates whether the IM data is locked from any type of update.
RORSTAT_IM_TFC		NUMBER	(6,0)		Total Family Contribution based on institutional methodology.
RORSTAT_IM_UNMET_NEED		NUMBER	(11,2)		Unmet need based on institutional methodology.
RORSTAT_INAS_OPTION		VARCHAR2	(1)		
RORSTAT_INFO_ACCESS_IND		VARCHAR2	(1)		A 'Y' or a NULL in this field indicates that the award information for this applicant may be accessed via Voice Response, Banner Web and similar methods.
RORSTAT_INST_PC_LOCK_IND		VARCHAR2	(1)		This field indicates if a lock exists on the institutional methodology parent contribution.
RORSTAT_INST_SC_LOCK_IND		VARCHAR2	(1)		This field indicates if a lock exists on the institutional methodology student contribution.
RORSTAT_LAST_CYCLE_ELIGIBLE		VARCHAR2	(1)		The last cycle that a student was eligible to receive Pell. 1=8788, 2=8889, 3=8990, 4=9091, 5=9192, 6=9293.
RORSTAT_MAX_YRS_ELIG		NUMBER	(1,0)		
RORSTAT_MEMO_REQ_COMP_DATE		DATE	(7)		
RORSTAT_NEED_DATE		DATE	(7)		
RORSTAT_NO_YRS_USED		NUMBER	(4,2)		

Continued on the next page

Applicant Status Table (Base Financial Aid Table - RORSTAT), Continued

Column	Required?	Data Type	Length	Validation	Comment
RORSTAT_NSLDS_OVRD_IND		VARCHAR2	(1)		Indicates which validation tests Packaging/Disbursement processes should override for a spedific year/student. L=limit tests(aggregate), D=default tests, O=overpayment tests, A=all tests.
RORSTAT_PC		NUMBER	(5,0)		This field indicates the parents' contribution toward educational expenses. It is the primary parental contribution from the student's current record.
RORSTAT_PCKG_COMP_DATE		DATE	(7)		The date that the student's Financial Aid package was complete.
RORSTAT_PCKG_FUND_DATE		DATE	(7)		
RORSTAT_PCKG_REQ_COMP_DATE		DATE	(7)		This field indicates the date that all tracking requirements have been satisfied for packaging.
RORSTAT_PELL_DISB_LOCK_IND		VARCHAR2	(1)		If Y, indicates that all disbursement activity for Pell is prevented due to RFMS disb. Reference numbers 91-99. Valid values Y, blank.
RORSTAT_PELL_LT_HALF_COA		NUMBER	(9,0)		Student's Pell Cost of Attendance if enrolled for less than half time.
RORSTAT_PELL_ORIG_IND		VARCHAR2	(1)		Identifier that indicates whether an updated Pell Origination record is to be created automatically. Valid values Y, blank.
RORSTAT_PELL_SCHED_AWD		NUMBER	(5,0)		This field indicates the scheduled Pell Grant Award for the aid year.
RORSTAT_PGI_LOCK_IND		VARCHAR2	(1)		This field indicates if a lock exists on the Pell Grant index.
RORSTAT_PGRP_CODE		VARCHAR2	(6)	RTVPGRP	This field indicates the packaging group code.

Continued on the next page

Applicant Status Table (Base Financial Aid Table - RORSTAT), Continued

Column	Required?	Data Type	Length	Validation	Comment
RORSTAT_PRI_SAR_PGI		NUMBER	(5,0)		This field indicates the primary SAR Pell Grant index (or EFC).
RORSTAT_RECALC_NA_IND		VARCHAR2	(1)		This field indicates whether the need analysis needs to be recalculated. If the indicator is set, then INAS will be run for this applicant in the next batch run.
RORSTAT_RESOURCE_ACT_DATE		DATE	(7)		The last date on which the resource amount column was updated.
RORSTAT_RESOURCE_AMT		NUMBER	(11,2)		The total amount of outside resources which will be used in the applicant's need calculation.
RORSTAT_SAR_DATE		DATE	(7)		This field identifies the date that the SAR is complete and ready for payment.
RORSTAT_SAR_INIT		VARCHAR2	(2)		This field maintains the original SAR initials as a part of the SAR identification number.
RORSTAT_SAR_PGI_LOCK_IND		VARCHAR2	(1)		This field identifies if a lock exists on the SAR Pell Grant index (or EFC).
RORSTAT_SAR_SSN		VARCHAR2	(9)		This field maintains the original SAR Social Security number portion of the SAR identification number.
RORSTAT_SAR_TRAN_NO		VARCHAR2	(2)		This field maintains the SAR transaction number associated with the record.
RORSTAT_SC		NUMBER	(5,0)		This field maintains the student's contribution toward educational expenses from the student's current need analysis record.
RORSTAT_SEC_SAR_PGI		NUMBER	(5,0)		This field maintains the secondary Pell Grant index from the student SAR.
RORSTAT_SLCT_IND		VARCHAR2	(1)		

Continued on the next page

Applicant Status Table (Base Financial Aid Table - RORSTAT), Continued

Column	Required?	Data Type	Length	Validation	Comment
RORSTAT_TFC		NUMBER	(6,0)		The student's most recently calculated TFC.
RORSTAT_TGRP_CODE		VARCHAR2	(6)	RTVTGRP	This field maintains the tracking group assigned to the student in the record.
RORSTAT_TRK_LTR_IND		VARCHAR2	(1)		This field indicates that a tracking letter should be generated for this student the next time tracking letters are printed.
RORSTAT_UNMET_NEED		NUMBER	(11,2)		This field maintains the student's unmet need, which is the gross need minus any awards.

Section L: Reference

Overview

Introduction

The purpose of this section is to provide reference materials related to the workbook.

In this section

These topics are covered in this section.

Topic	Page
Forms Job Aid	L-2

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Forms Job Aid

Introduction Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
GJAJOBS	Process Maintenance Form	
GJAPCTL	Process Submission Controls Form	
GJAPDEF	Parameter Definitions Form	
GJAPDFT	Default Parameter Value Validations Form	
GJAPVAL	Parameter Value Validations Form	
GJARSLT	Process Results Form	
GLAEXTR	Population Selection Extract Data Form	
GLIAPPL	Application Inquiry Form	
GLIEXTR	Population Selection Extract Data Inquiry Form	
GLROBJT	Object Definition Rules Form	
GLRVRBL	Variable Definition Rules Form	
GTVLETR	Letter Code Validation Form	
GTVPARA	Paragraph Code Validation Form	
GTVPRNT	Printer Validation Form	
GUAINST	Installation Control Form	
GUALETR	Letter Process Form	
GUAPARA	Letter Generation Paragraph Form	
RBAABUD	Applicant Budget Form	
RCRINFR	Data Source Code Validation Form	
RCRNAME	First Name Translation Rules Form	
RCRTPTR	Interface Data Translation Rules Form	
REACORR	ISIR Correction/Request Form	
READIxx	[Year-specific] Pell Disbursement/Acknowledgement Form	
READRCT	EDE Directory Form	
REAORxx	[Year-specific] Pell Origination/Acknowledgement Form	
REIDSOA	Detail Statement of Account Inquiry Form	
REIRMRR	Multiple Reporting Record Inquiry Form	

Continued on the next page

Forms Job Aid, Continued

Introduction, continued

Form Name	Form Description	Owner
REISSOA	Summary Statement of Account Inquiry Form	
REIYTDS	Year to Date Pell Summary Inquiry Form	
RERRDRQ	Data Request Record Form	
RFIBUDG	Fund Budget Inquiry Form	
RFIFFID	Federal Fund ID Inquiry Form	
RFRASCH	Fund Award and Disbursement Schedule Rules Form	
RFRBASE	Fund Base Data Form	
RFRDEFA	Default Award and Disbursement Schedule Rules Form	
RFRMGMT	Fund Management Form	
RHACOMM	Applicant Comments Form	
RHAPBAW	Pre-Banner Award Summary Form	
RHAPTRN	Prior Institution Transcript Form	
RHARQST	Financial Aid Transcript Request Form	
RHATINF	Transcript Information Form	
RHIAFSH	Fund Sequence History Inquiry Form	
RHRTRNS	Transcript Rules Form	
RJASEAR	Student Employment Authorization Form	
RJASEME	Student Employment Mass Entry Form	
RJASERF	Student Employment Referral Form	
RJISEWH	Student Employment Work History Form	
RNANAxx	[Year-specific] Need Analysis Form	
RNAOVxx	[Year-specific] Applicant Override Form	
RNAPRxx	[Year-specific] Need Analysis Processing Form	
RNAPURG	Application Purge Form	
RNARSLT	Need Analysis Result Form	
RNASLxx	[Year-specific] Student Loan Data System Form	

Continued on the next page

Forms Job Aid, Continued

Introduction, continued

Form Name	Form Description	Owner
RNASUxx	[Year-specific] Need Analysis Supplemental Form	
RNAVRxx	[Year-specific] Need Analysis Document Verification Form	
RNIAPPL	Applicant Need Analysis Application Inquiry Form	
RNIMSxx	[Year-specific] Miscellaneous Results Inquiry Form	
RNINAIQ	Calculated Need Analysis Detail Inquiry Form	
RNINSLD	Applicant Student Loan Data Inquiry Form	
RNRGLxx	INAS Global Policy Options Rules Form	
ROAALOG	Applicant Data Log Application Form	
ROAFSAP	FISAP Person Maintenance Form	
ROAIDEN	Person Name/ID Search Form	
ROAIMMP	Applicant Immediate Process Form	
ROAINST	Institutional Financial Aid Options Form	
ROAMGMT	Funds Management Form	
ROAPELL	Applicant Pell Grant Form	
ROAPERS	Financial Aid General Person Form	
ROARMAN	Financial Aid Record Maintenance Form	
ROASTAT	Applicant Status Form	
ROIAIDY	Aid Year Inquiry Form	
ROIALOG	Applicant Data Log Inquiry Form	
ROIDISB	Disbursement Results Form	
ROIILOG	Data Log Inquiry Form	
ROISAPR	SAP Code Inquiry Form	
ROISARI	SAR ID Inquiry Form	
RORRULE	Financial Aid Selection Rules Form	
RPAAPMT	Package Maintenance Form	
RPAARSC	Resource Form	
RPAAWRD	Award Form	
RPAIDEN	Financial Aid Identification Form	

Continued on the next page

Forms Job Aid, Continued

Introduction, continued

Form Name	Form Description	Owner
RPAMACC	Award Acceptance Mass Entry Form	
RPAMOFF	Award Offer Mass Entry Form	
RPIARPY	Contracts and Exemptions Payment Inquiry Form	
RPIATRM	Applicant Award by Term Form	
RPIBATC	Batch Control Form	
RPIFEDR	Federal Rules Inquiry Form	
RRAAREQ	Applicant Requirements Form	
RRAMASS	Applicant Requirements Mass Entry Form	
RRRGREQ	Requirements Tracking Group/Requirements Rules Form	
RRRTMSG	Requirements Tracking Code/Message Rules Form	
RSIAPPL	Admissions Application Inquiry Form	
RSIAREV	Account Detail Review Inquiry Form	
RSIAREV	Account Detail Review Inquiry Form	
RSICONT	Third Party Contract Inquiry Form	
RSIDEGR	Degrees and Other Formal Awards Inquiry Form	
RSIDEGR	Degrees and Other Formal Awards Inquiry Form	
RSIENRL	Financial Aid Enrollment Inquiry Form	
RSIEXPT	Billing Exemption Inquiry Form	
RSIHIST	Summary Academic History Inquiry Form	
RSIHOUS	Housing Information Inquiry Form	
RSIHSCH	High School Inquiry Form	
RSIINTL	International Student Inquiry Form	
RSIPCOL	Prior College Inquiry Form	
RSISTDN	Basic Student Information Inquiry Form	
RSITEST	Test Score Inquiry Form	
RSIVETN	Veteran Certification Inquiry Form	
RTVFSRC	Fund Source Code Validation Form	
RTVFTYP	Financial Aid Fund Type Validation Form	

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Forms Job Aid, Continued

Introduction, continued

Form Name	Form Description	Owner
RTVHOLD	Hold Type Validation Form	
RTVRJCT	Rejection Code Validation Form	
RTVTGRP	Requirements Tracking Group Validation Form	
RTVTREQ	Requirements Tracking Validation Form	
RTVTRST	Requirements Tracking Status Validation Form	
STVCNTY	County Code Validation Form	
STVSBGI	Source/Background Institution Code Validation Form	
STVSTAT	State/Province Code Validation Form	

Release Date

This workbook was last updated on 6/14/2005.